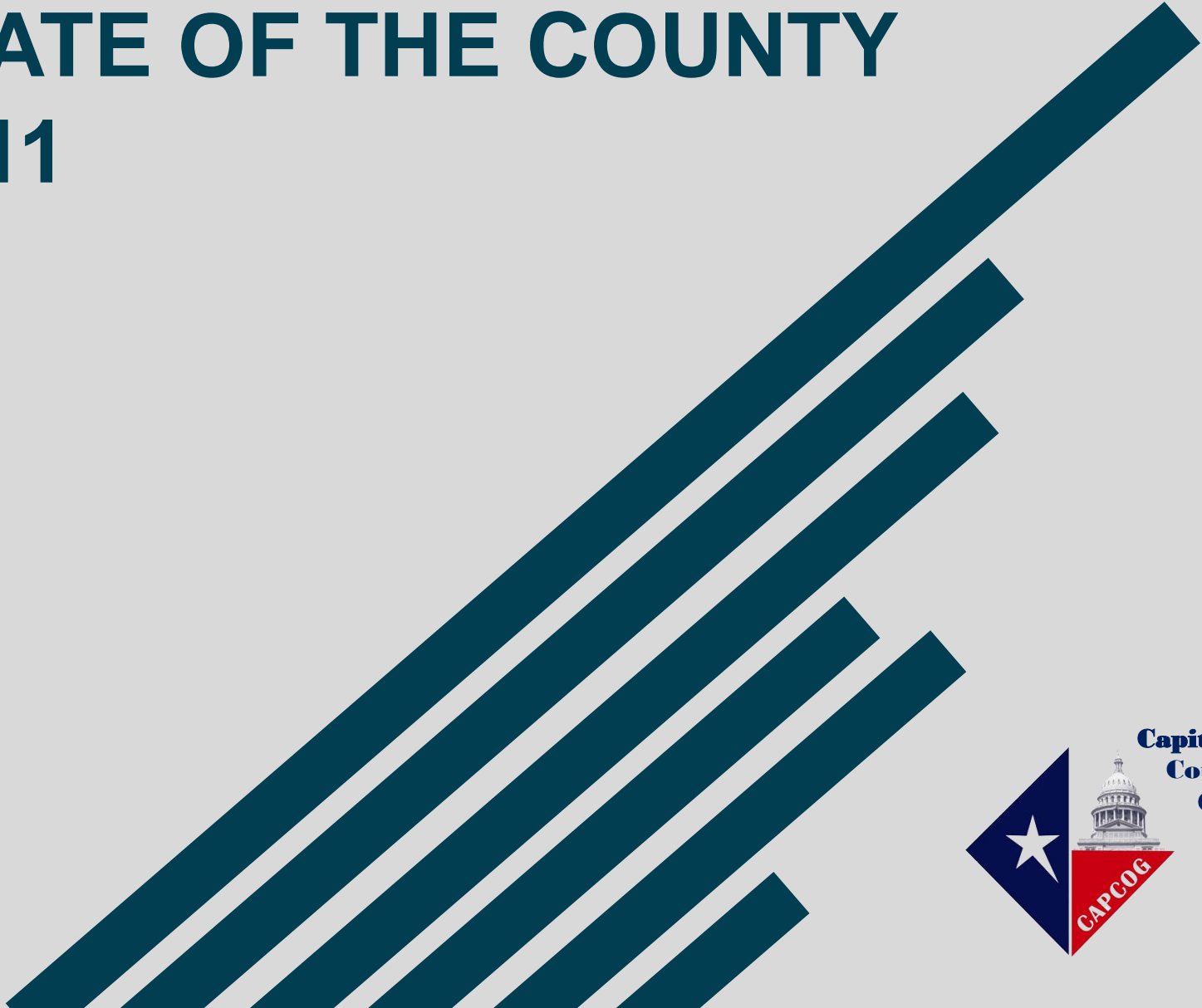
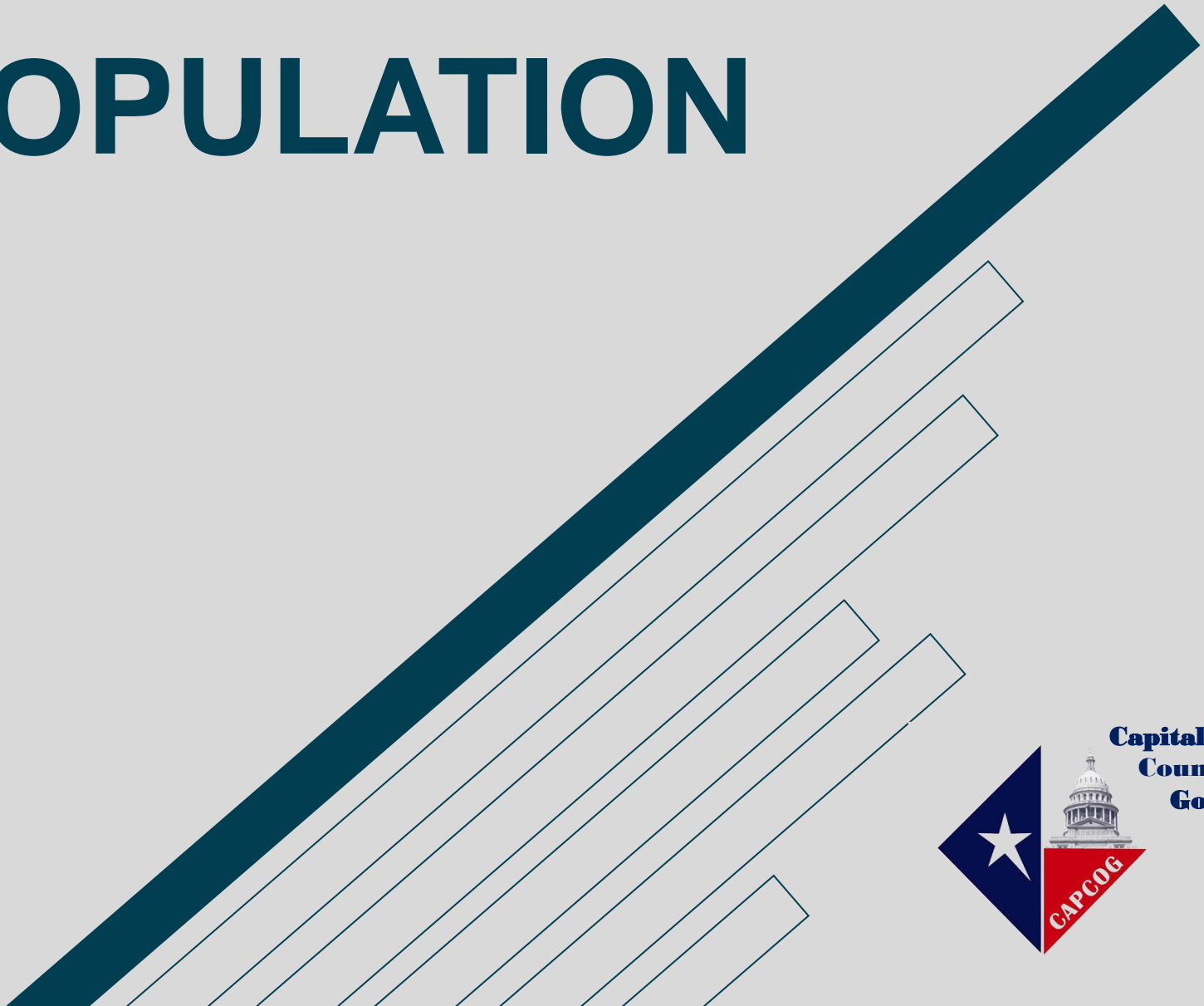


# CALDWELL STATE OF THE COUNTY 2011



# POPULATION

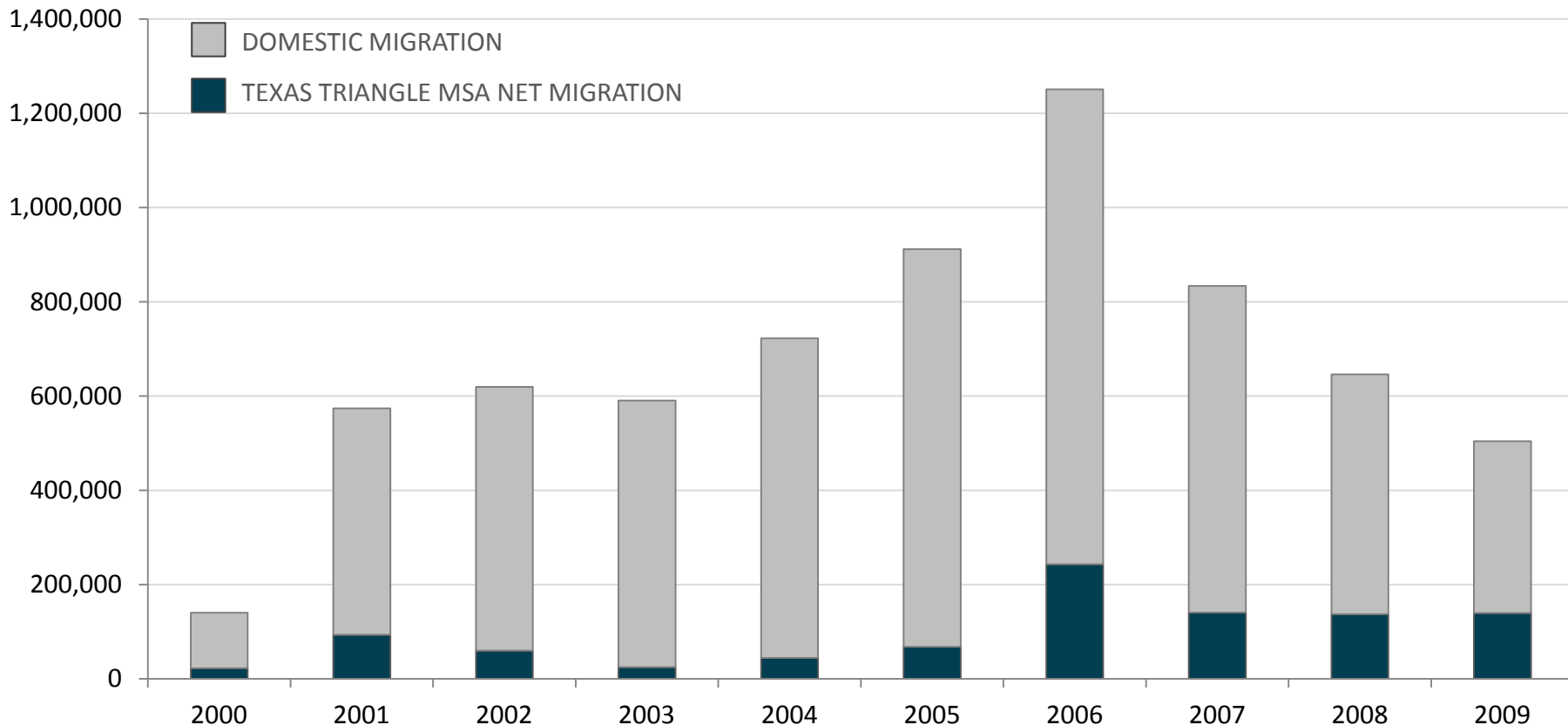


# POPULATION – THE RISE OF TEXAS

*During the past decade, the State of Texas has proved tremendously attractive to residents living outside the state. While migration in the U.S. has dropped significantly since the beginning of the recession, Texas continues to lure people from across the country. In 2009, nearly one in four people who moved did so to one of four metropolitan areas—Austin, Dallas, Houston, and San Antonio.*

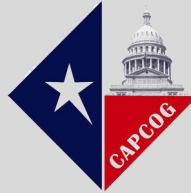


## U.S. INTERNAL MIGRATION PATTERNS (2000 – 2009)

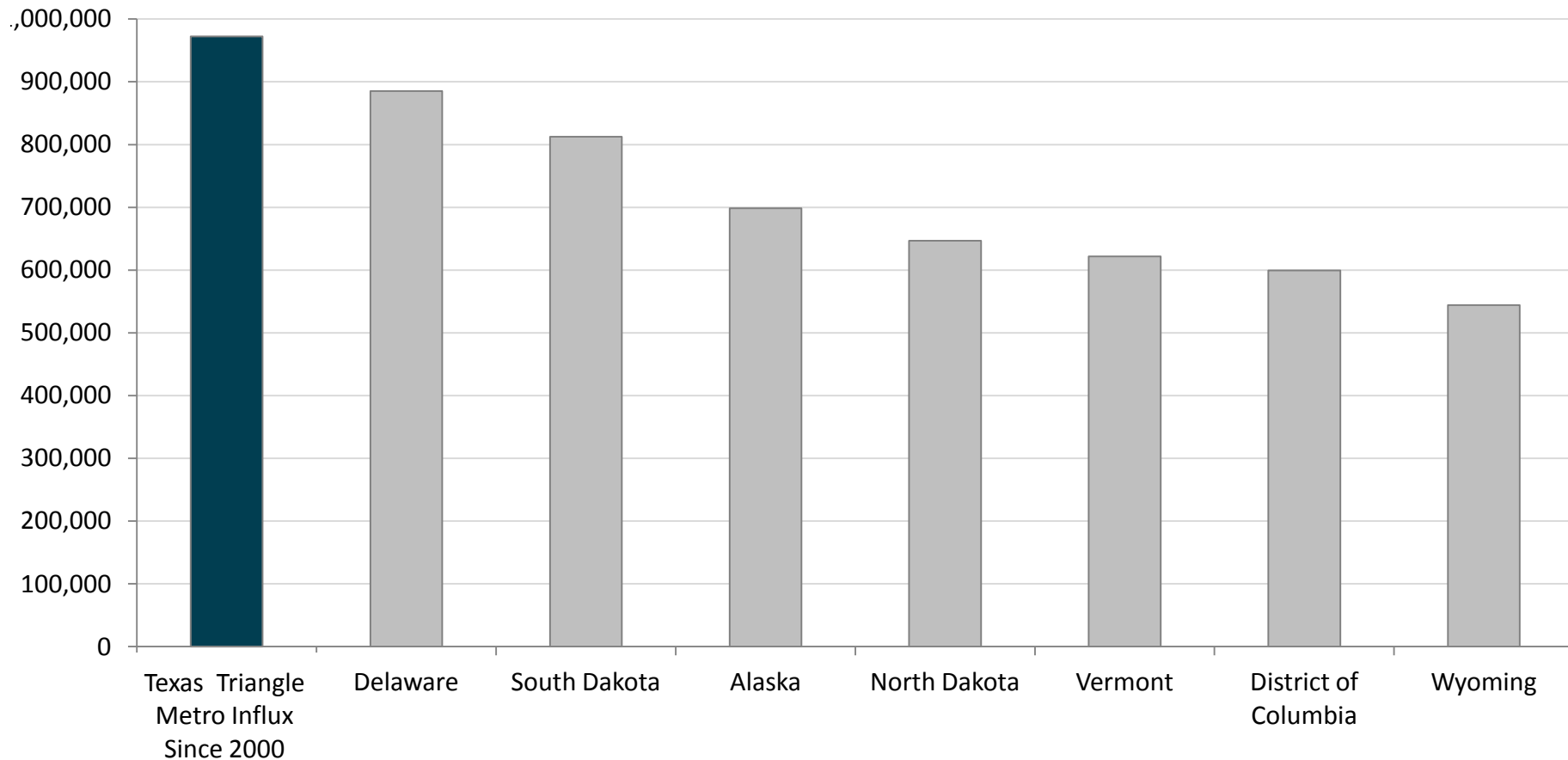


# POPULATION – THE RISE OF TEXAS

*Since 2000, more than 972,000 people have moved to the Texas Triangle's four major metropolitan areas—Austin, Dallas, Houston, and San Antonio. To put this number in perspective, the population of Delaware is just 885,000. In fact, the number of new residents that have moved to the Texas Triangle during the past decade is greater than the population of six states and the District of Columbia.*



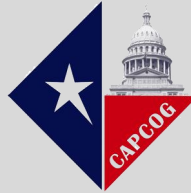
## TEXAS MIGRATION SINCE 2000 COMPARED TO STATE POPULATIONS



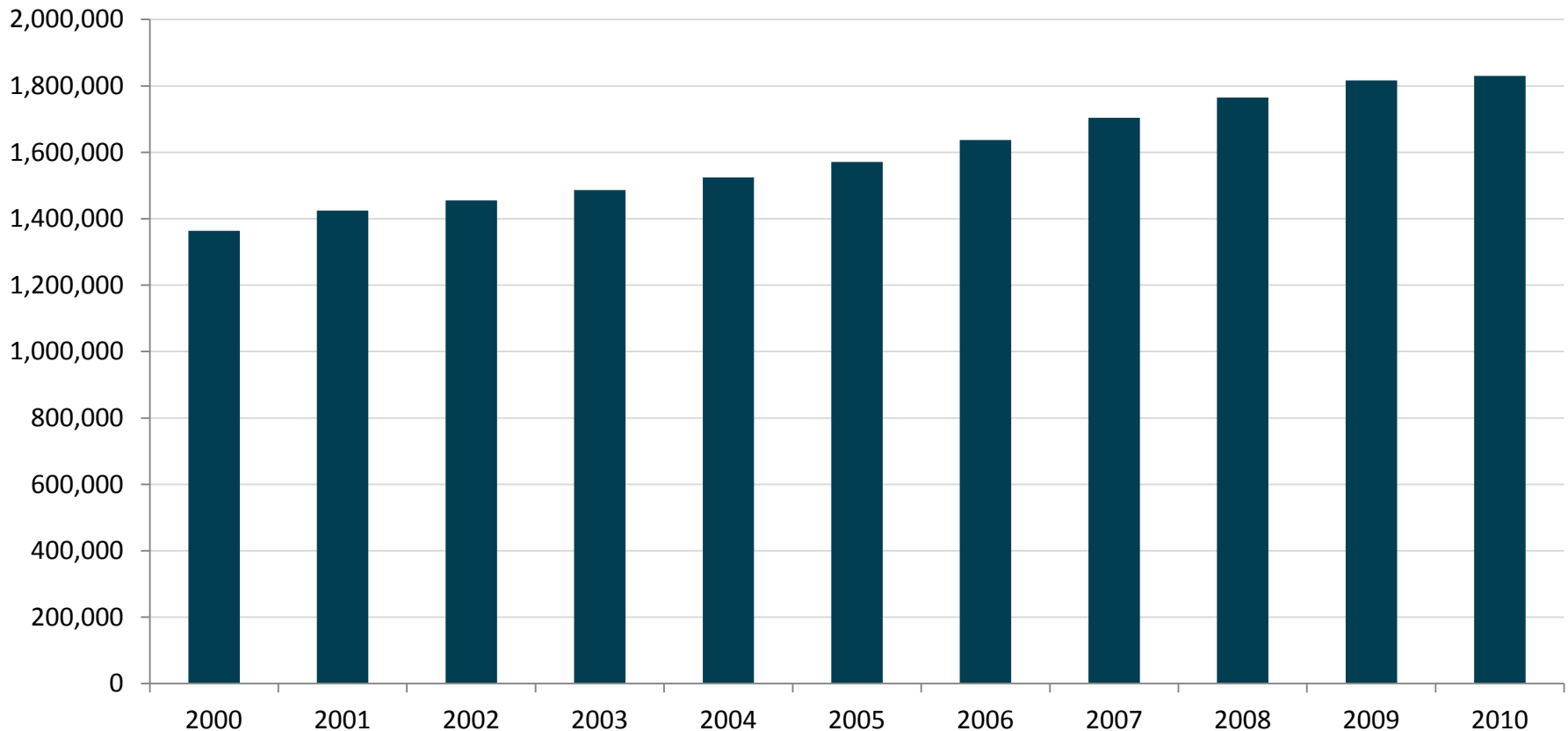
SOURCE: U.S. CENSUS BUREAU

# POPULATION – CAPCOG REGION GROWTH

*The CAPCOG region has experienced significant growth during the past decade. Since 2000, the population of the 10-County CAPCOG region has jumped from 1.36 million to 1.83 million—an increase of more than 34 percent. During this same period, the population of the U.S. increased just 9.7 percent and the population of Texas increased 20.6 percent.*

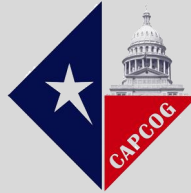


## POPULATION OF 10-COUNTY CAPCOG REGION

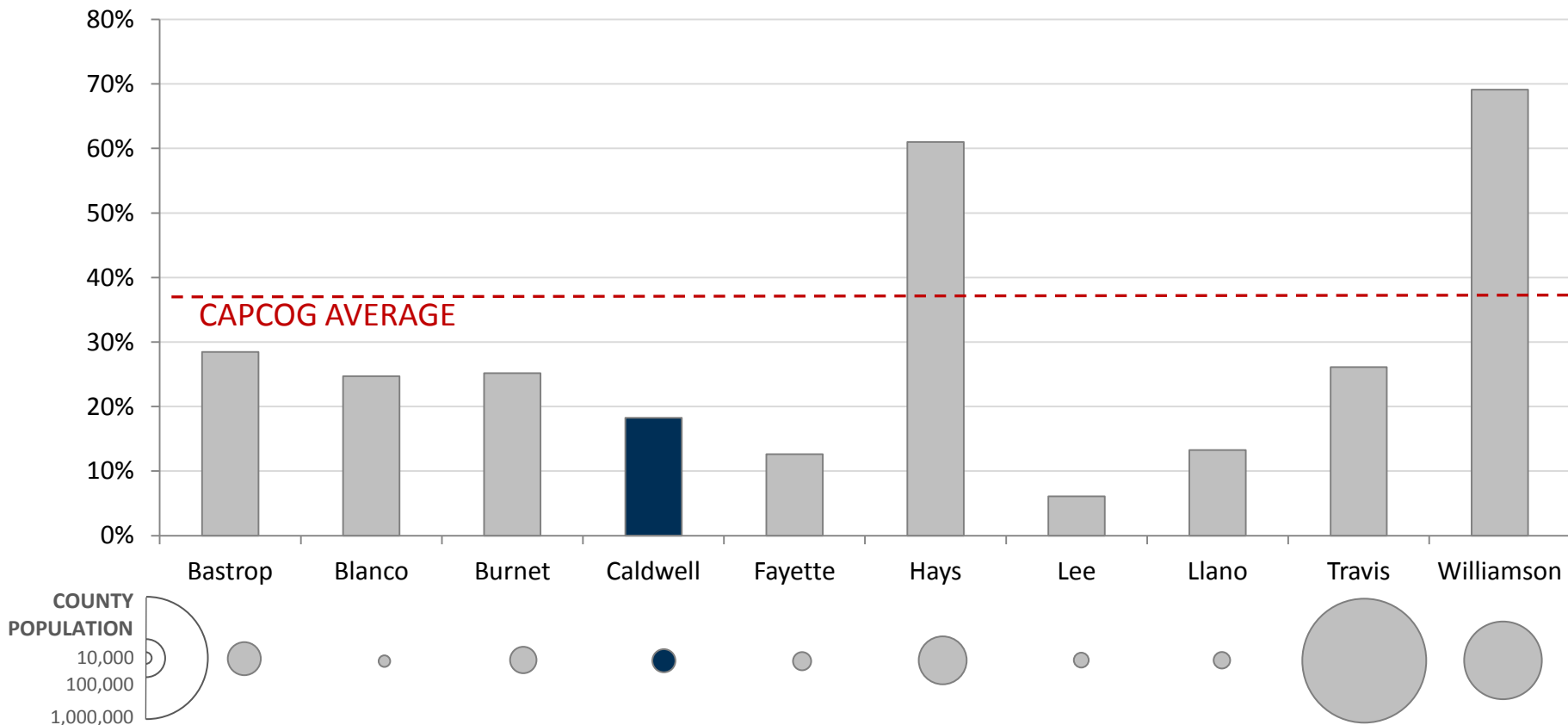


# POPULATION – CAPCOG REGION GROWTH

Within the CAPCOG region Caldwell County experienced the fourth-slowest rate of growth during the past decade. Since 2000, the population of Caldwell County has increased by 18 percent. The population of Travis County, the traditional engine of growth within the region, increased by 26 percent during the past decade and added the greatest number of new residents.



## POULATION GROWTH OF 10-COUNTY CAPCOG REGION (2001 TO 2010)



# POPULATION - COMPONENTS OF POPULATION CHANGE

*The spectacular growth of the CAPCOG region is largely due to massive levels of migration. In the U.S., for example, new migrants to the country account for little more than a third of all population growth. Instead, most population gains are attributable to natural increases (births minus deaths). Within the CAPCOG region, however, migration is responsible for two-thirds of all population growth. Within Caldwell County, migration now accounts for more than 60 percent of all population gains.*



## POPULATION GROWTH : MIGRATION VS. NATURAL INCREASE (2000 – 2009)

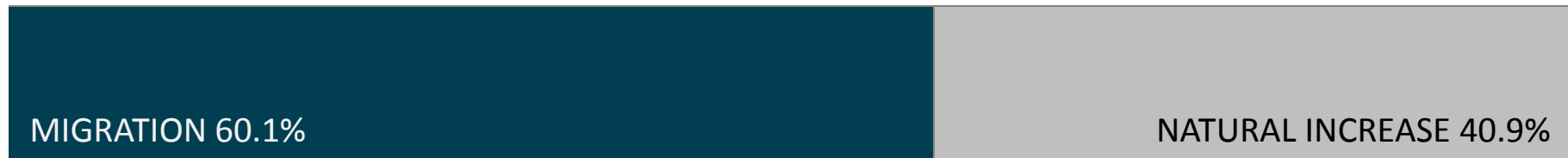
### U.S.



### CAPCOG

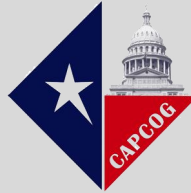


### CALDWELL COUNTY



# POPULATION – CALDWELL COUNTY IN-MIGRATION PATTERNS

*Within the region, Travis County serves as a giant funnel for migrants. Each year, thousands of people move to Travis County from major metropolitan areas throughout the country. In turn, many of these people later move to surrounding counties. Caldwell County is a recipient of this second-wave migration dynamic. Between 2007 and 2008, the overwhelming share of migrants to Caldwell County were from Travis County. A smaller number of migrants moved from other parts of Texas.*

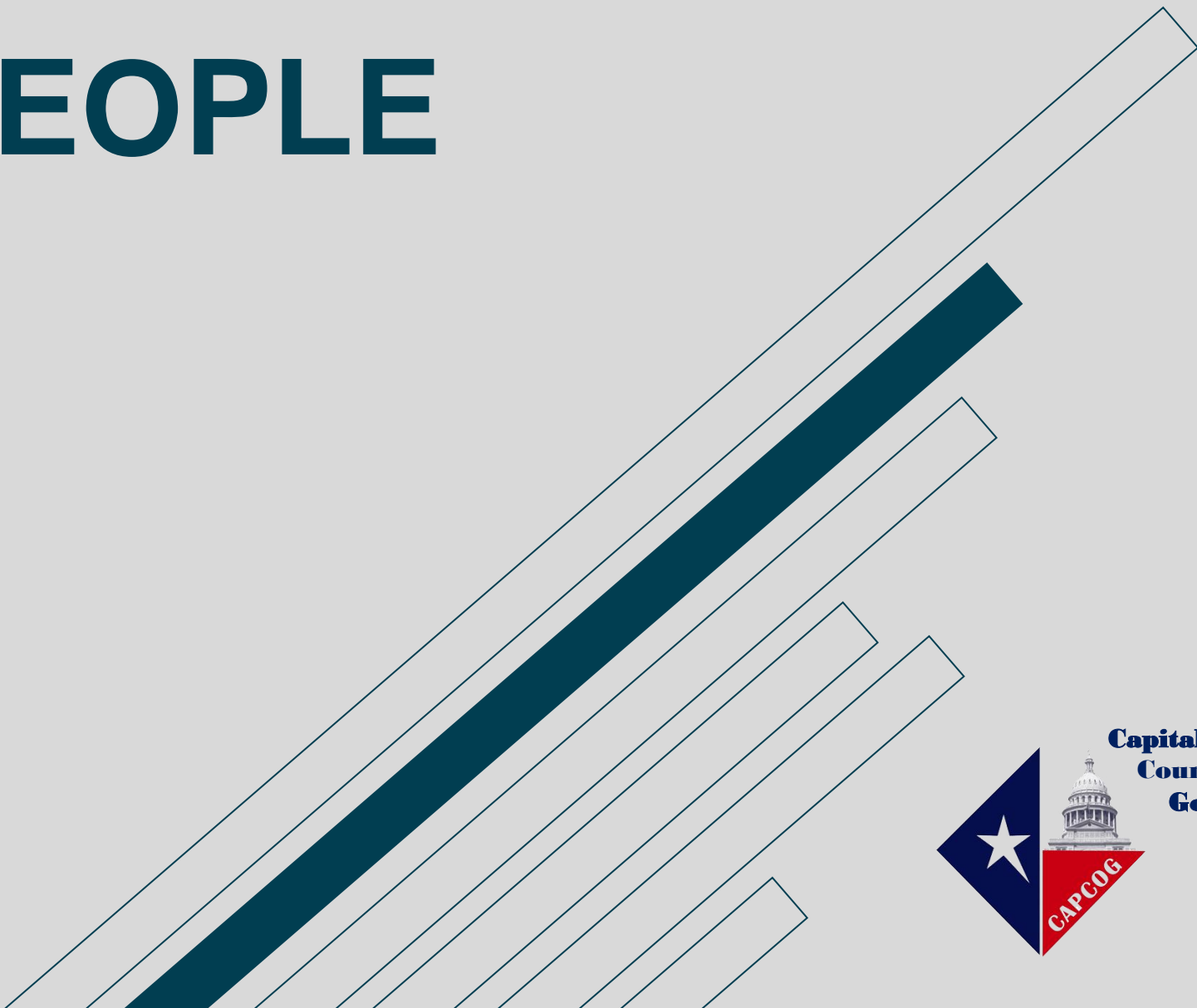


## ORIGIN OF IN-MIGRANTS TO CALDWELL COUNTY (2007-2008)



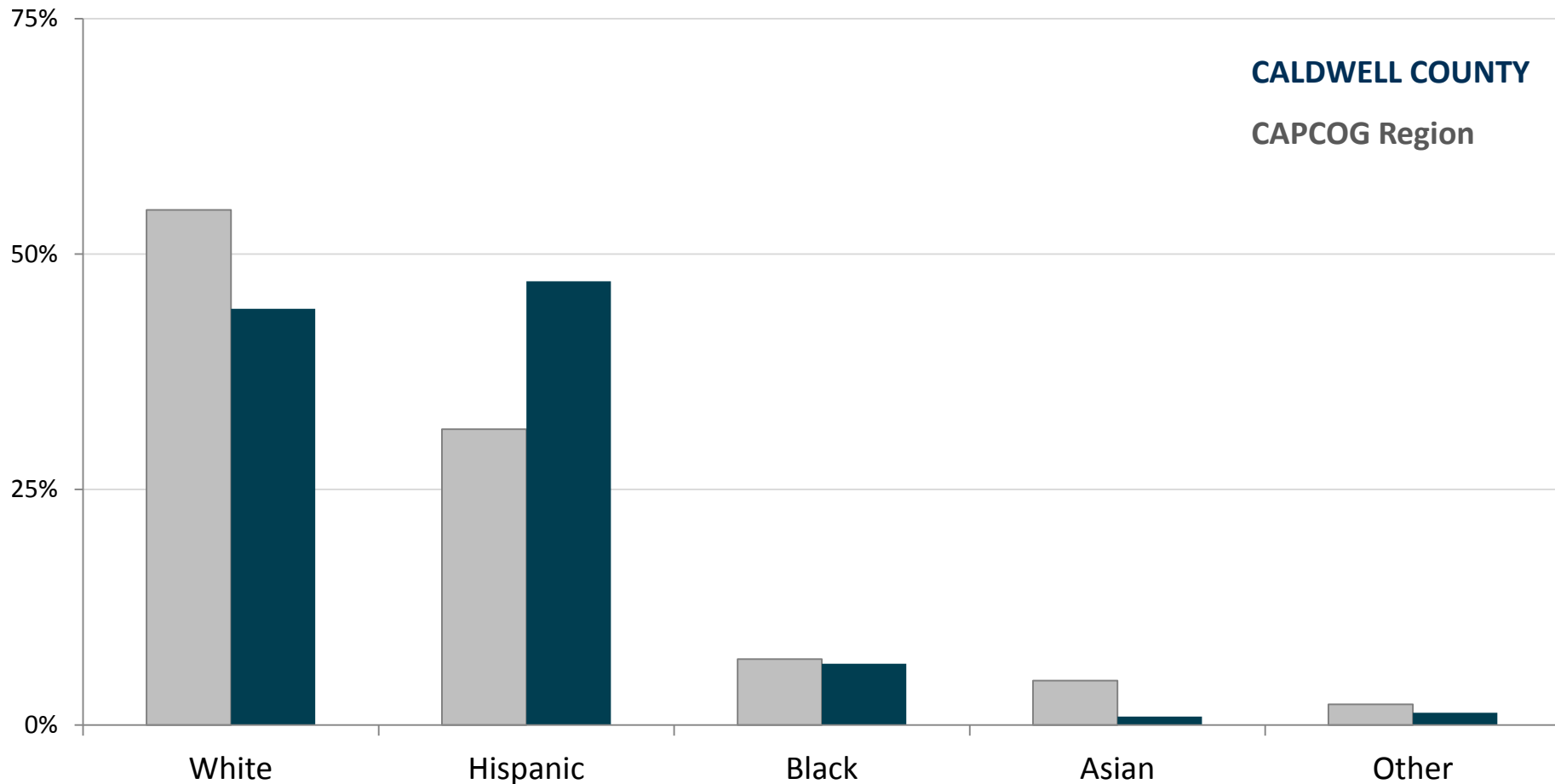
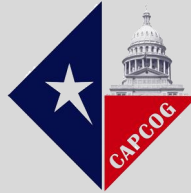


# PEOPLE



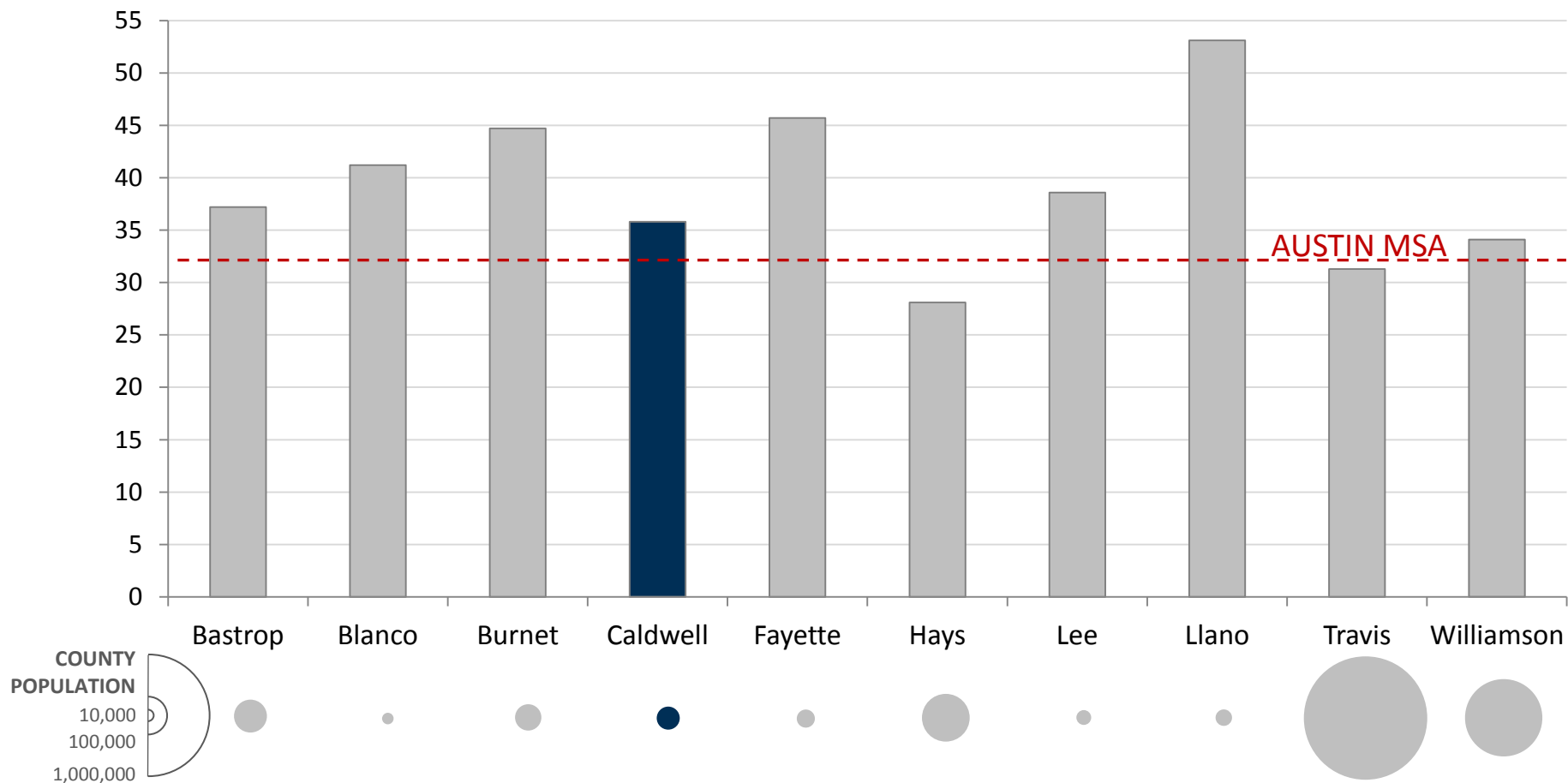
# PEOPLE - RACIAL & ETHNIC COMPOSITION - 2010

*The racial and ethnic composition of Caldwell County differs slightly from regional average. The proportion of White residents, for example, is lower in Caldwell County than in the CAPCOG region. In contrast, Hispanic residents represent a larger share of Caldwell County's population than the regional average. Caldwell County features a similar ratio of Black residents compared to the regional average, but far fewer Asian residents.*



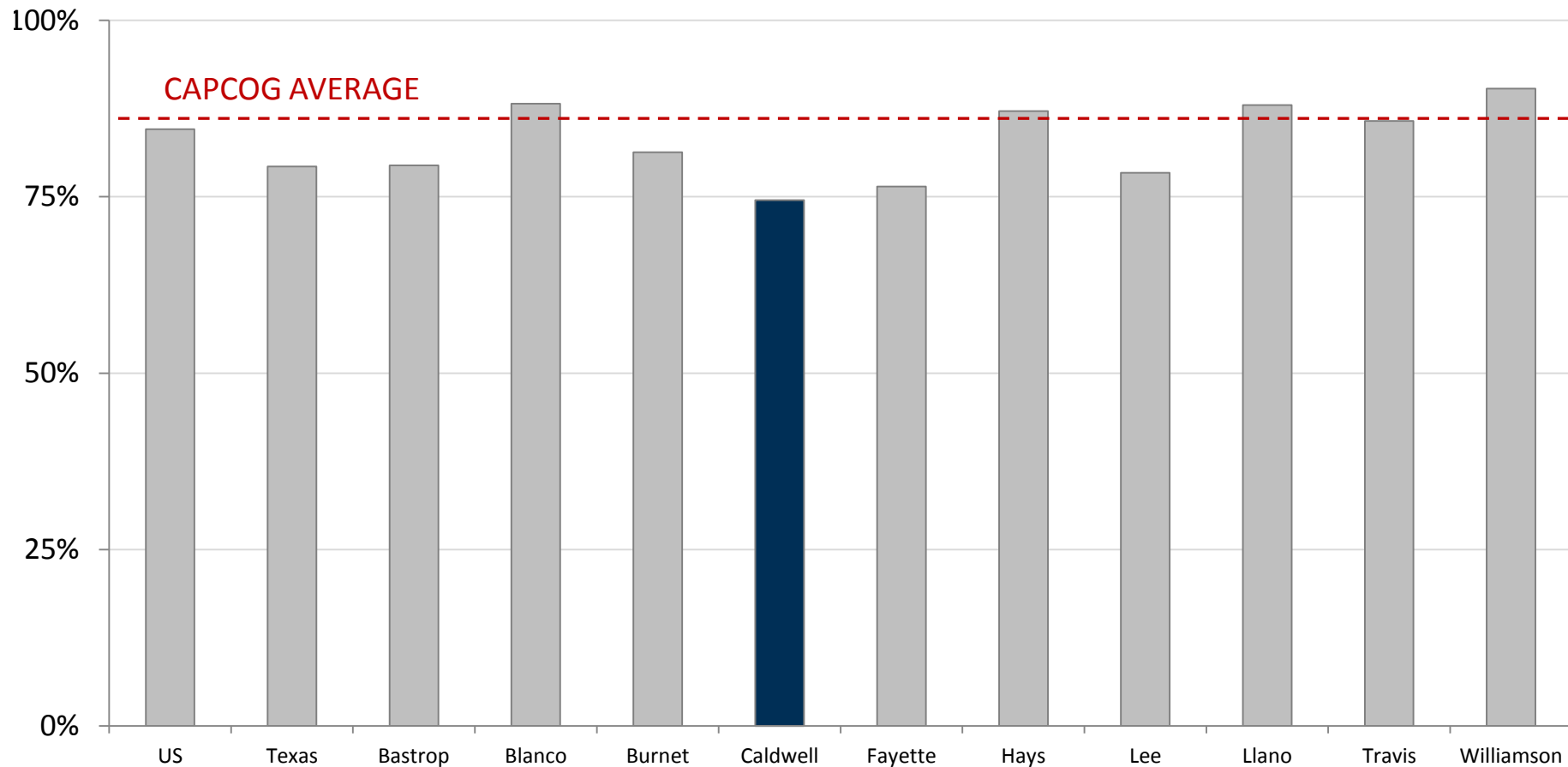
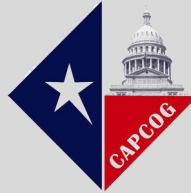
# PEOPLE – MEDIAN AGE (2005-2009)

*Caldwell County is the fourth-youngest county in the CAPCOG region, with a median age of just 35.8.*



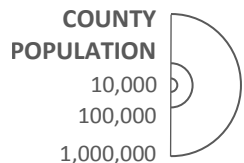
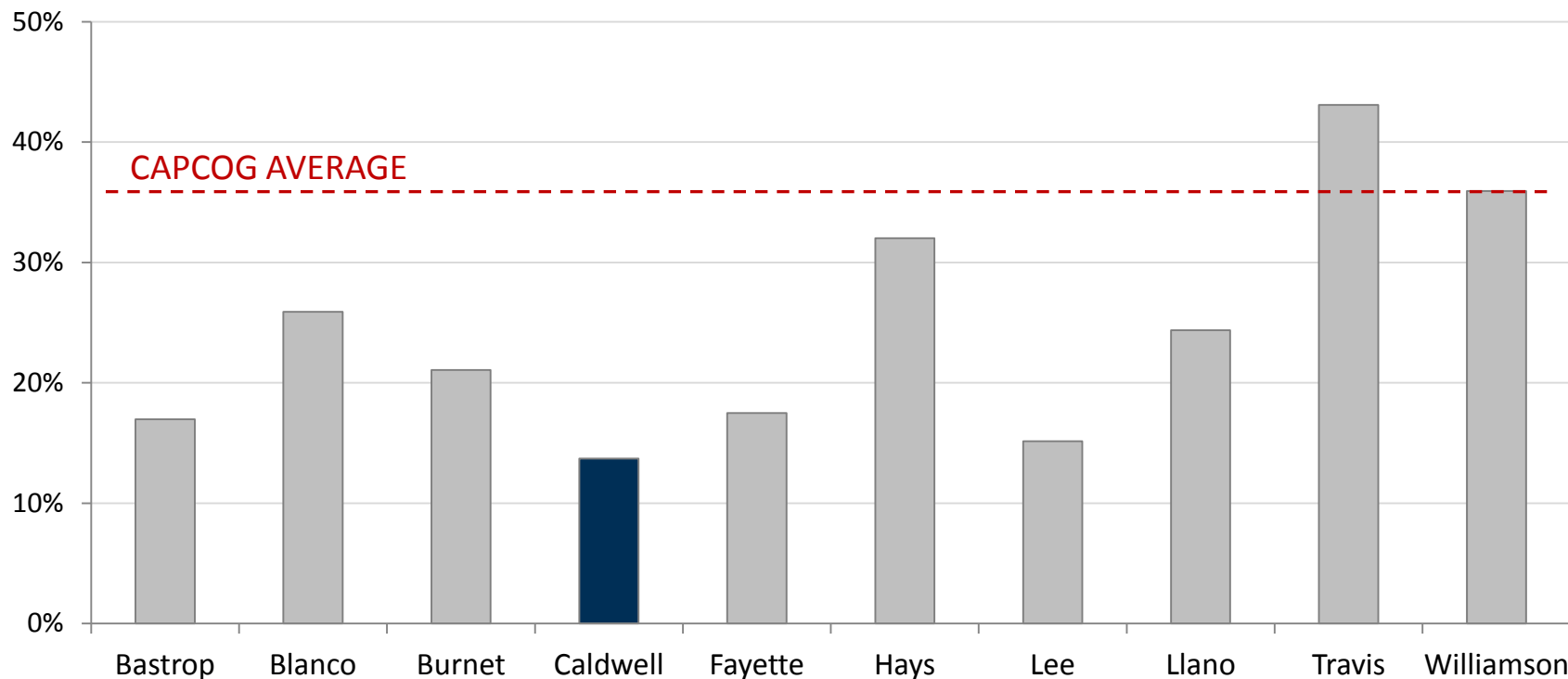
# PEOPLE – H.S. EDUCATIONAL ATTAINMENT (2005-2009)

*Approximately 75 percent of all residents 25 years and older within Caldwell County possess a high school (or equivalent) degree. Within the CAPCOG region, Caldwell County has a lower level of high school educational attainment than other counties.*



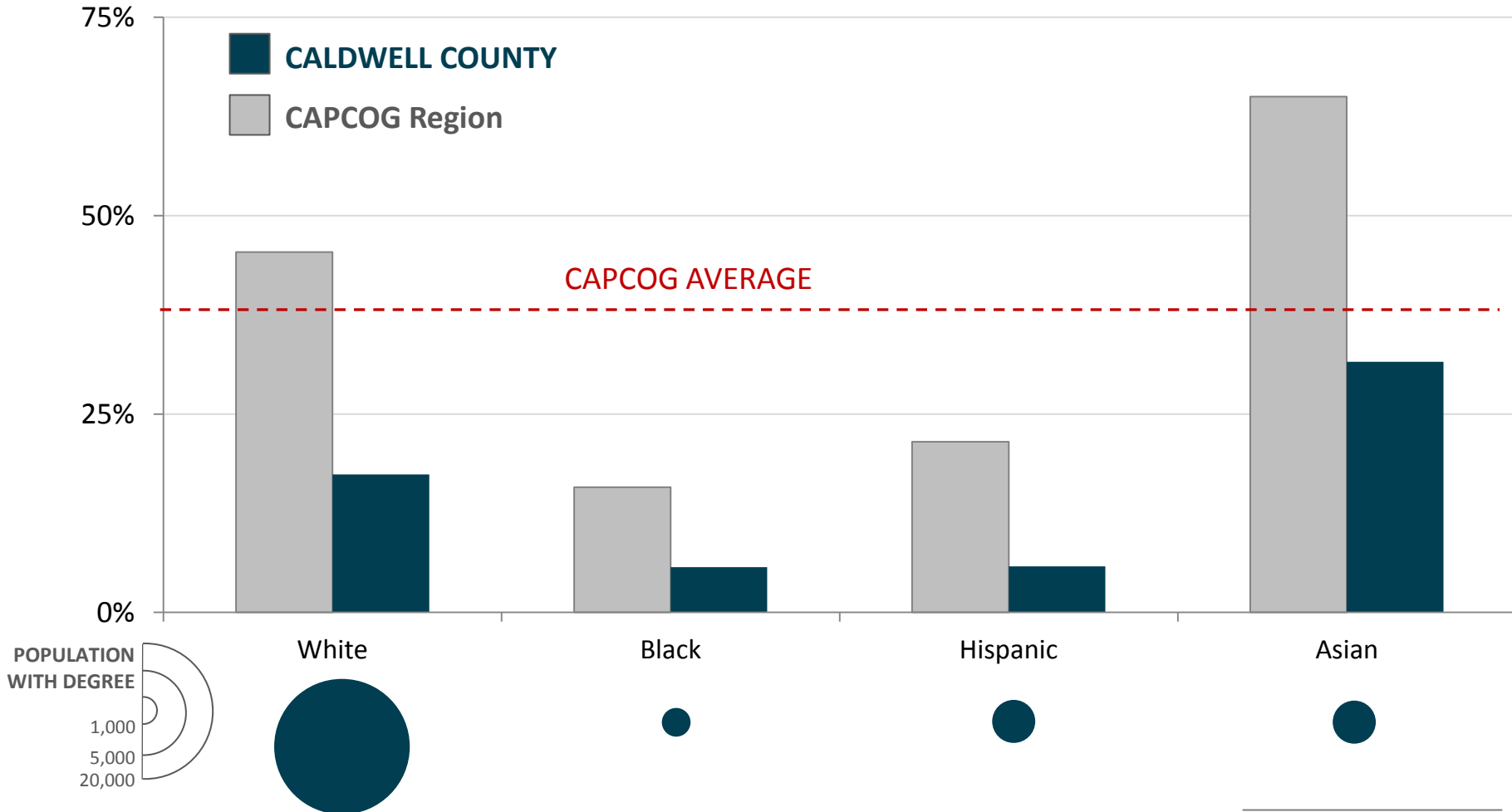
# PEOPLE – COLLEGE EDUCATIONAL ATTAINMENT (2005-2009)

Nearly 14 percent of Caldwell County residents over the age of 25 possess a 4-year college education, the lowest level of college educational attainment within the CAPCOG region.

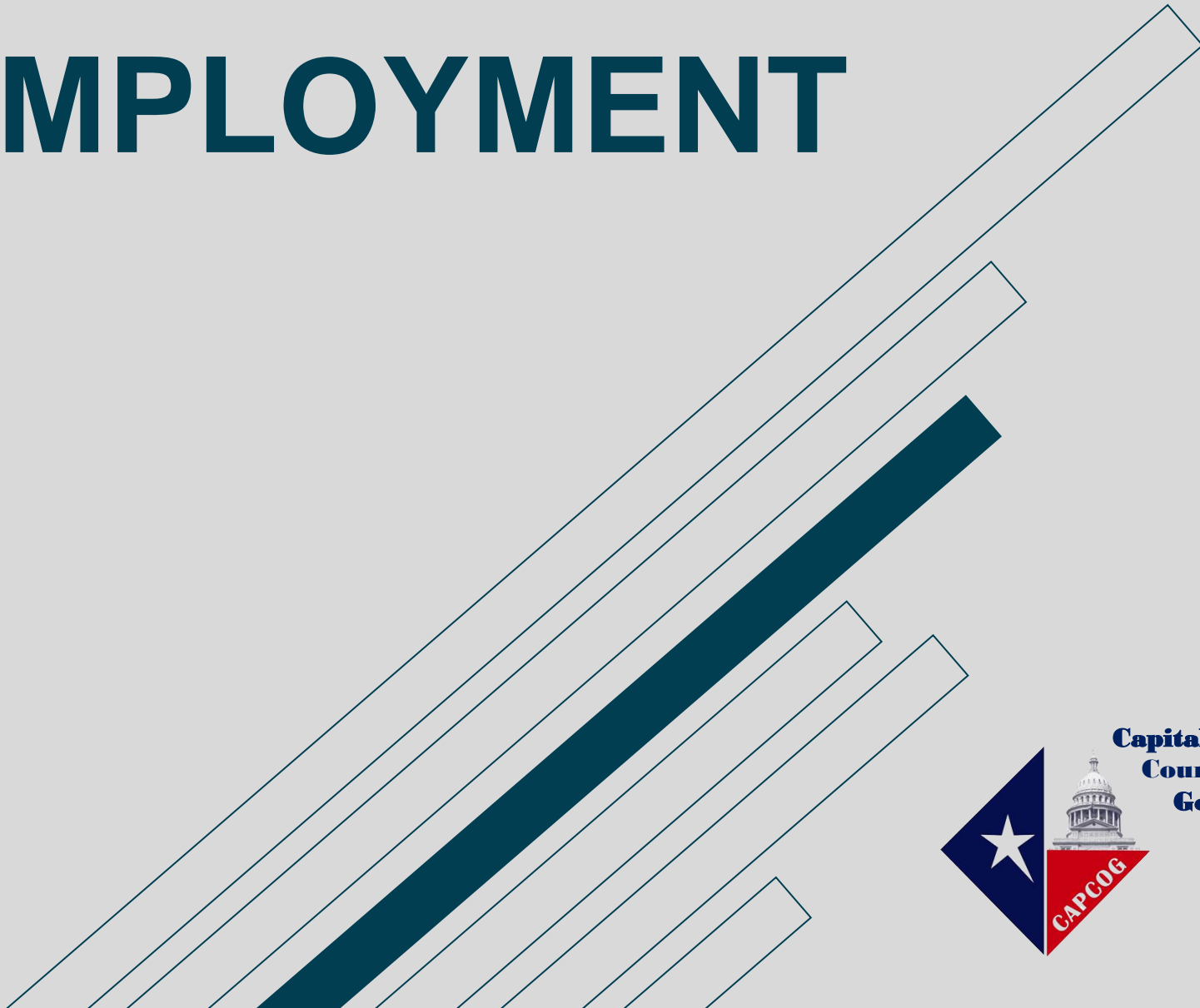


# PEOPLE - EDUCATIONAL ATTAINMENT BY RACE (2005-2009)

Within Caldwell County (and the CAPCOG region), there are striking differences in the educational attainment levels of individual racial and ethnic groups. While nearly 32 percent of Asian residents age 25 years and older within Caldwell County possess a college degree, for example, the figure is less than 6 percent for Hispanic and Black residents. Given the growth trajectories of individual racial and ethnic groups, these differences have profound consequences for our region.

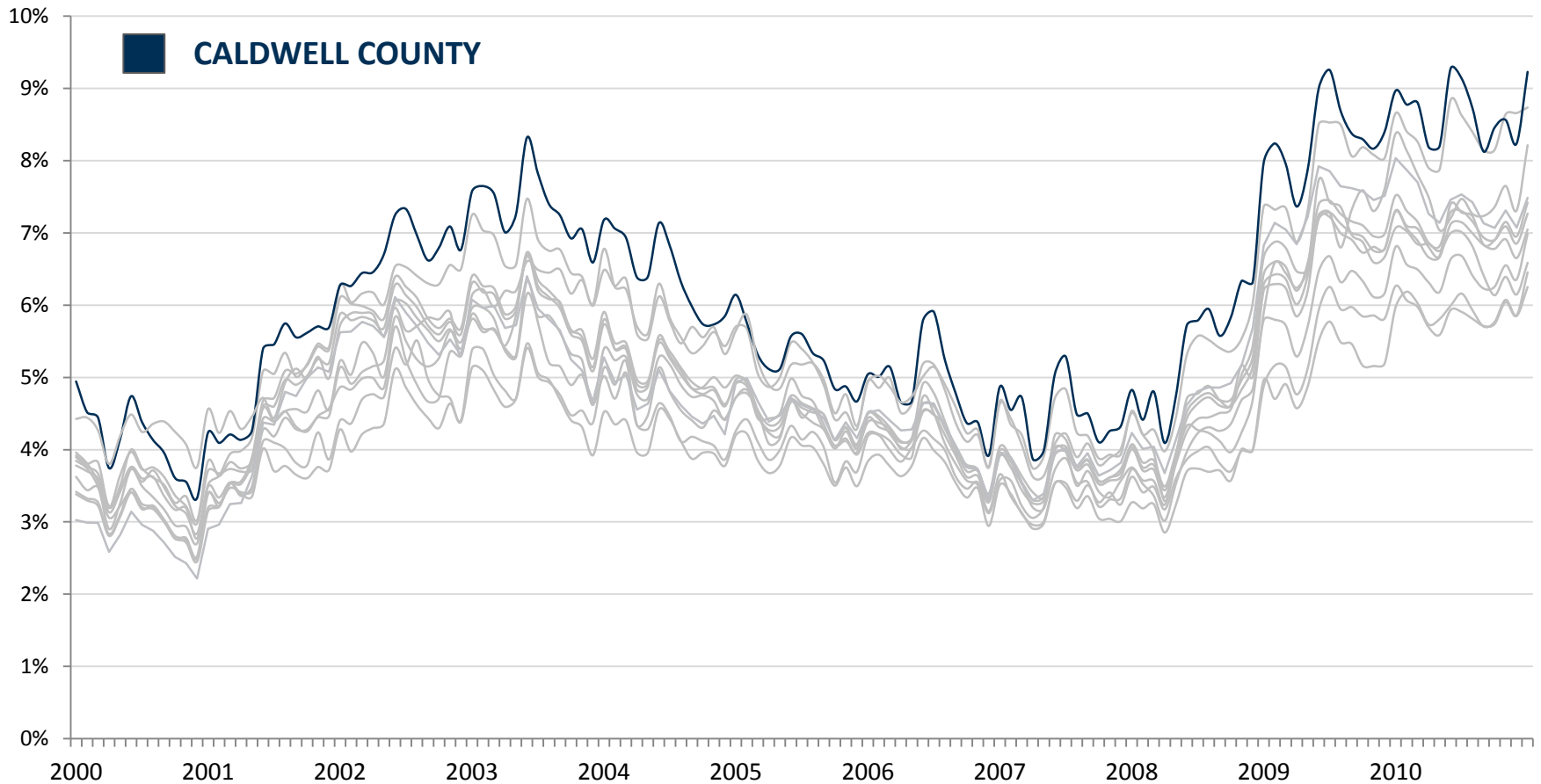
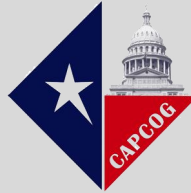


# EMPLOYMENT



# UNEMPLOYMENT – 2000 - 2010

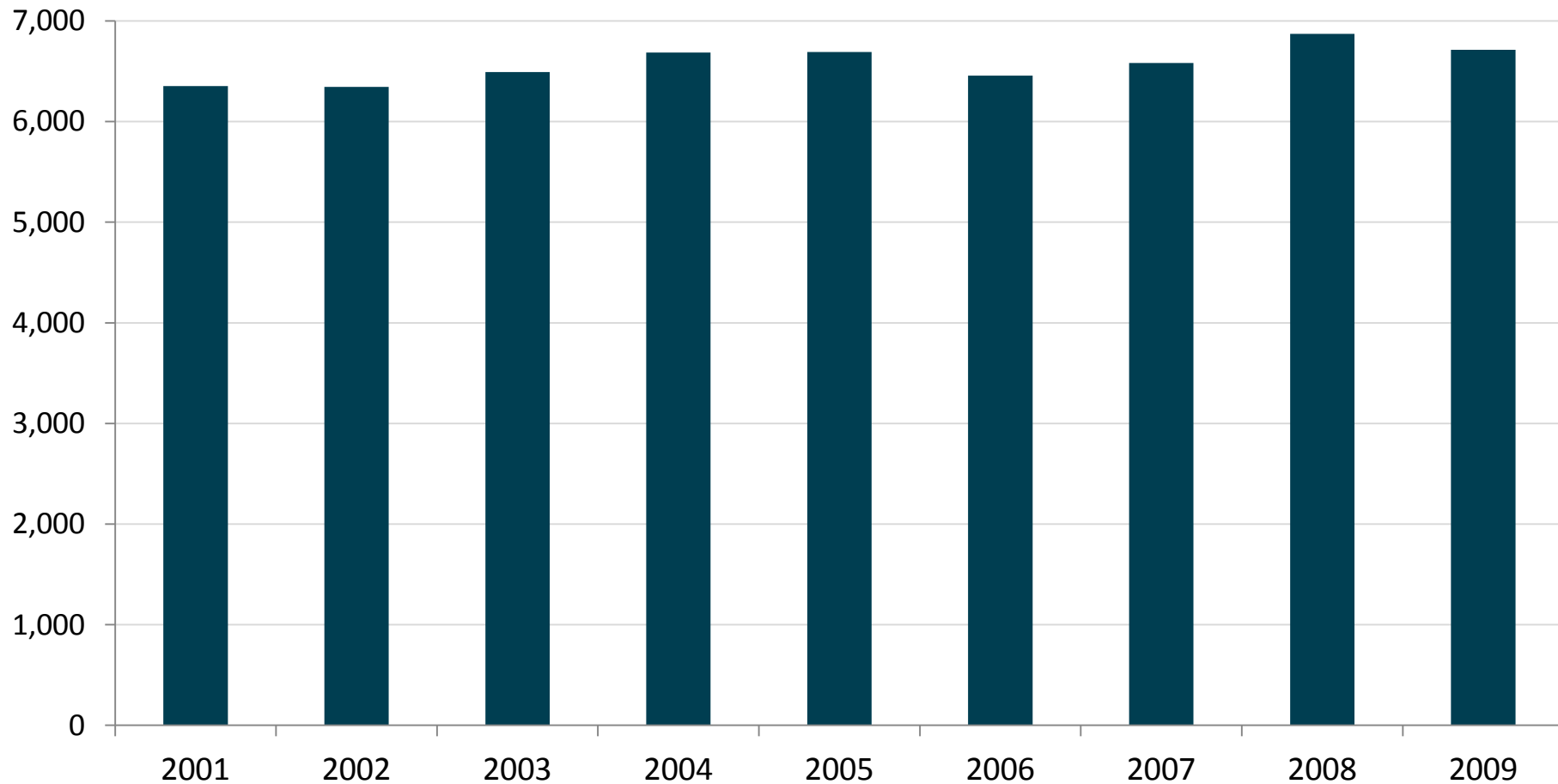
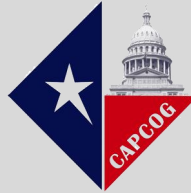
*During the past decade, the unemployment rate of Caldwell County has been consistently higher than the rest of the region. Today, the unemployment rate in Caldwell County is higher than 8 percent, below the national average but slightly higher than the regional average.*





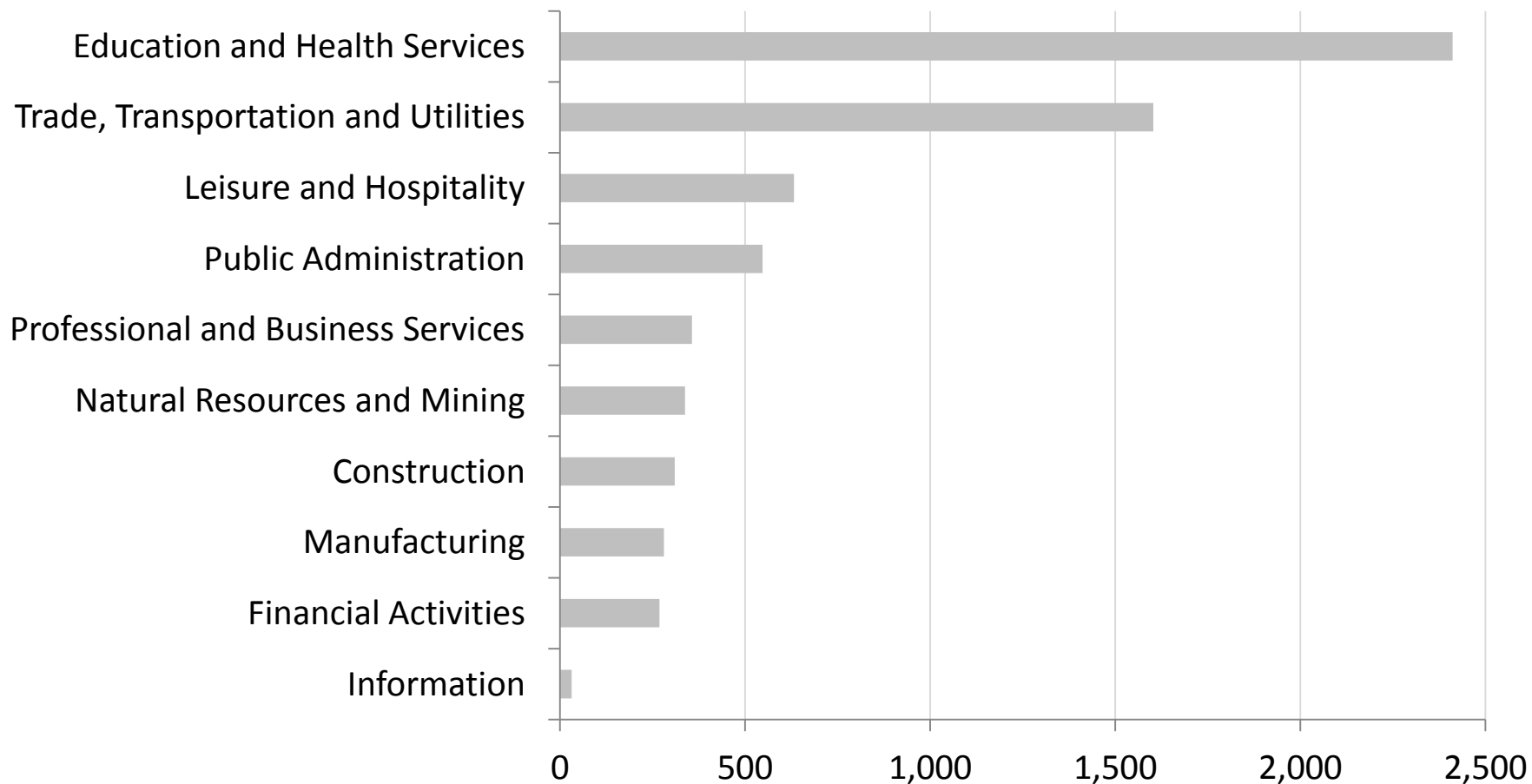
# EMPLOYMENT – 2001 - 2010

*Since 2001, employment in Caldwell County has grown from approximately 6,350 jobs to more than 6,700 jobs—an increase of approximately 5.5 percent. Although employment dipped in 2009, Caldwell County weathered the recession better than many regions in the country.*



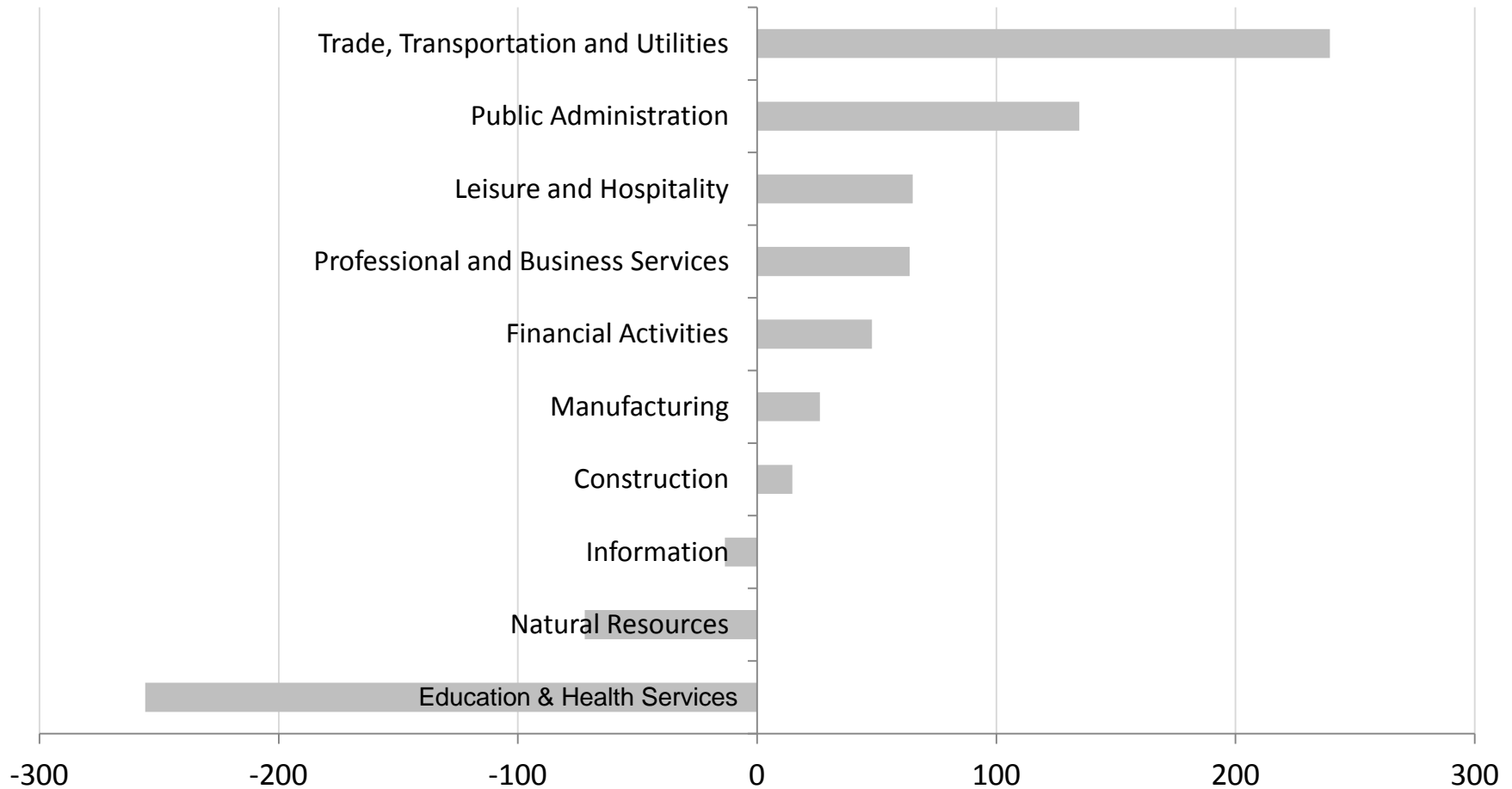
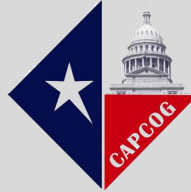
# CALDWELL COUNTY EMPLOYMENT BY INDUSTRY (2010)

*With more than 2,400 workers, Education & Health Services is the largest employment category within Caldwell County. Trade, Transportation & Utilities, with approximately 1,600 workers, is the second-largest employment category. The third-largest employment category in Caldwell County, Leisure & Hospitality, employs more than 600 workers.*



# CALDWELL COUNTY EMPLOYMENT BY INDUSTRY (2006 – 2010)

*During the past five years, the Trade, Transportation & Utilities employment sector has added the greatest number of jobs within Caldwell County. Public Administration added the second-greatest number of jobs during this period. The Leisure & Hospitality sector added the third-greatest number of jobs. Within the Leisure & Hospitality sector, many of the jobs created were in quick-service restaurants.*



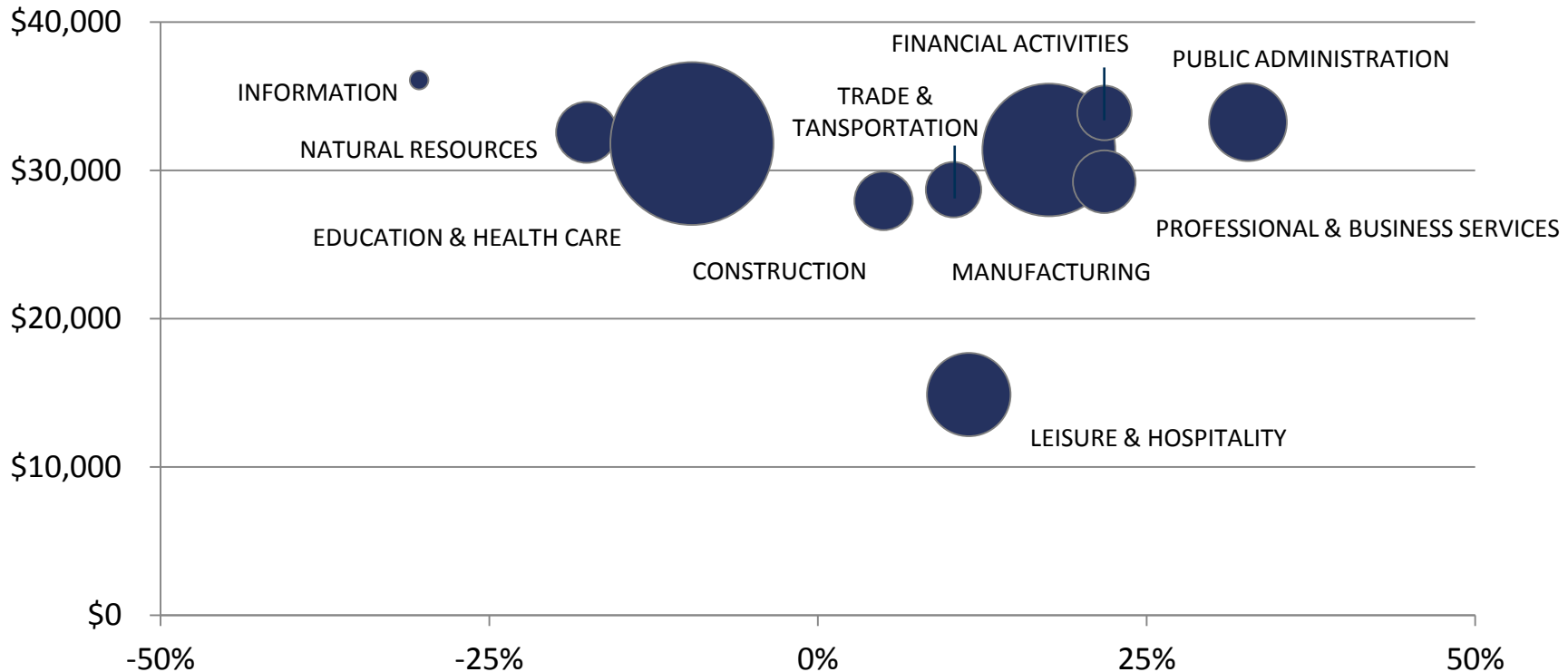
# CALDWELL COUNTY DYNAMICS OF EMPLOYMENT GROWTH

One of the more troubling employment trends within the CAPCOG region is the interrelation of job growth and prevailing wages. In short, low-skill, low-wage industries such as Leisure & Hospitality, for example, are growing faster than high-skill, high-wage jobs in industries such as Manufacturing and Construction.

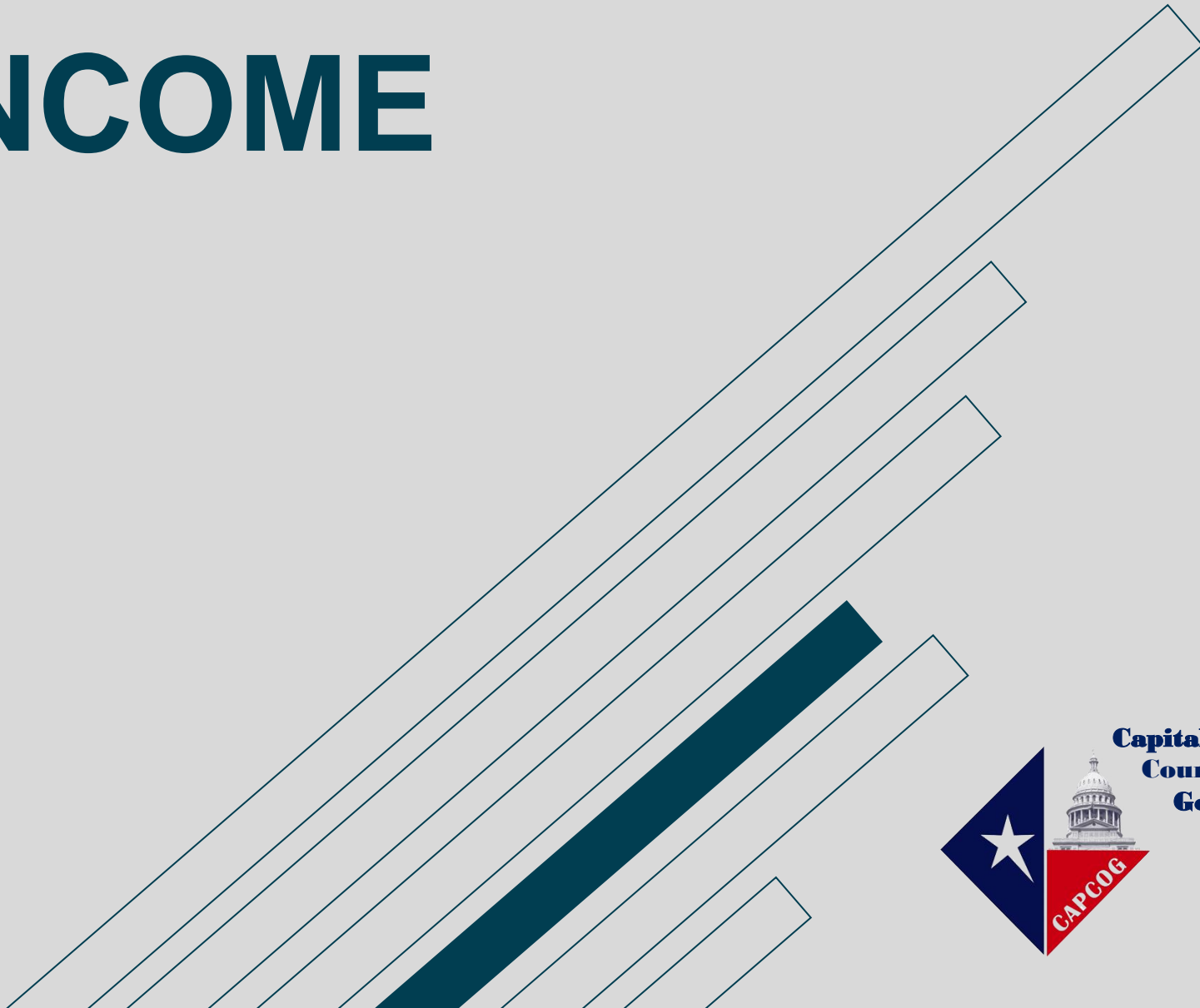


## EMPLOYMENT GROWTH (2006 – 2010) VS. AVERAGE SALARY (2010) VS. EMPLOYMENT SIZE (2010)

### CALDWELL COUNTY

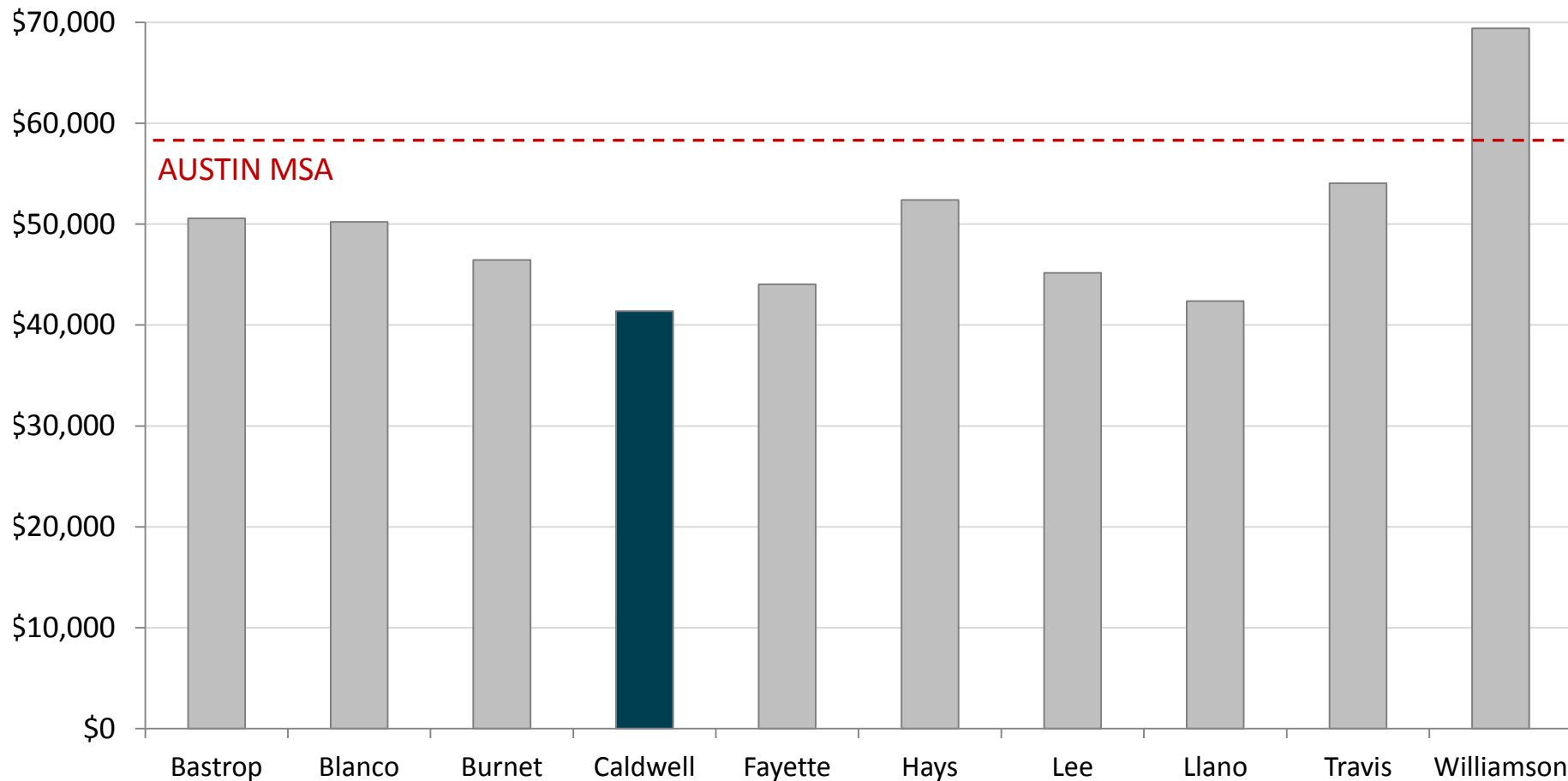


# INCOME



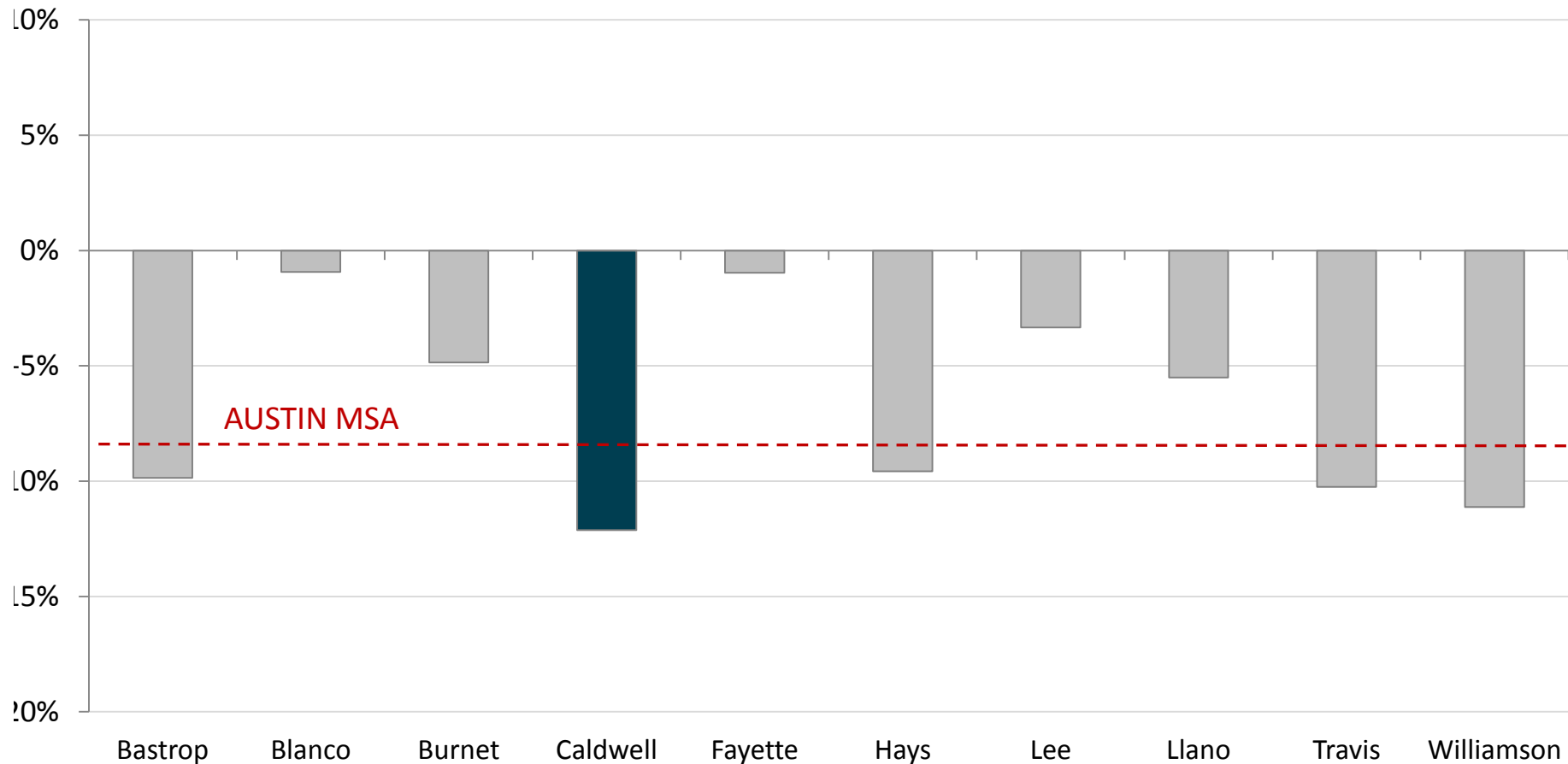
# MEDIAN HOUSEHOLD INCOME (2005-2009)

Median household income in Caldwell County is approximately \$41,000, the lowest figure within the CAPCOG region. Median household income in Caldwell County is more than \$15,000 lower than the CAPCOG regional average.



# CHANGE IN MEDIAN HOUSEHOLD INCOME (2000 vs. 2005/09)

Higher levels of growth among low-skill, low-wage industries has resulted in declining levels of household income in Caldwell County and every county within the CAPCOG region. Between 2000 and 2009, median household income levels in Caldwell County fell 12.1 percent (on an inflation-adjusted basis). During the past decade, Caldwell County has suffered the most severe decline in household income within the CAPCOG region.



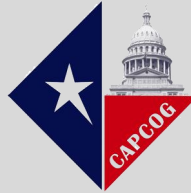
# AFFORDABILITY



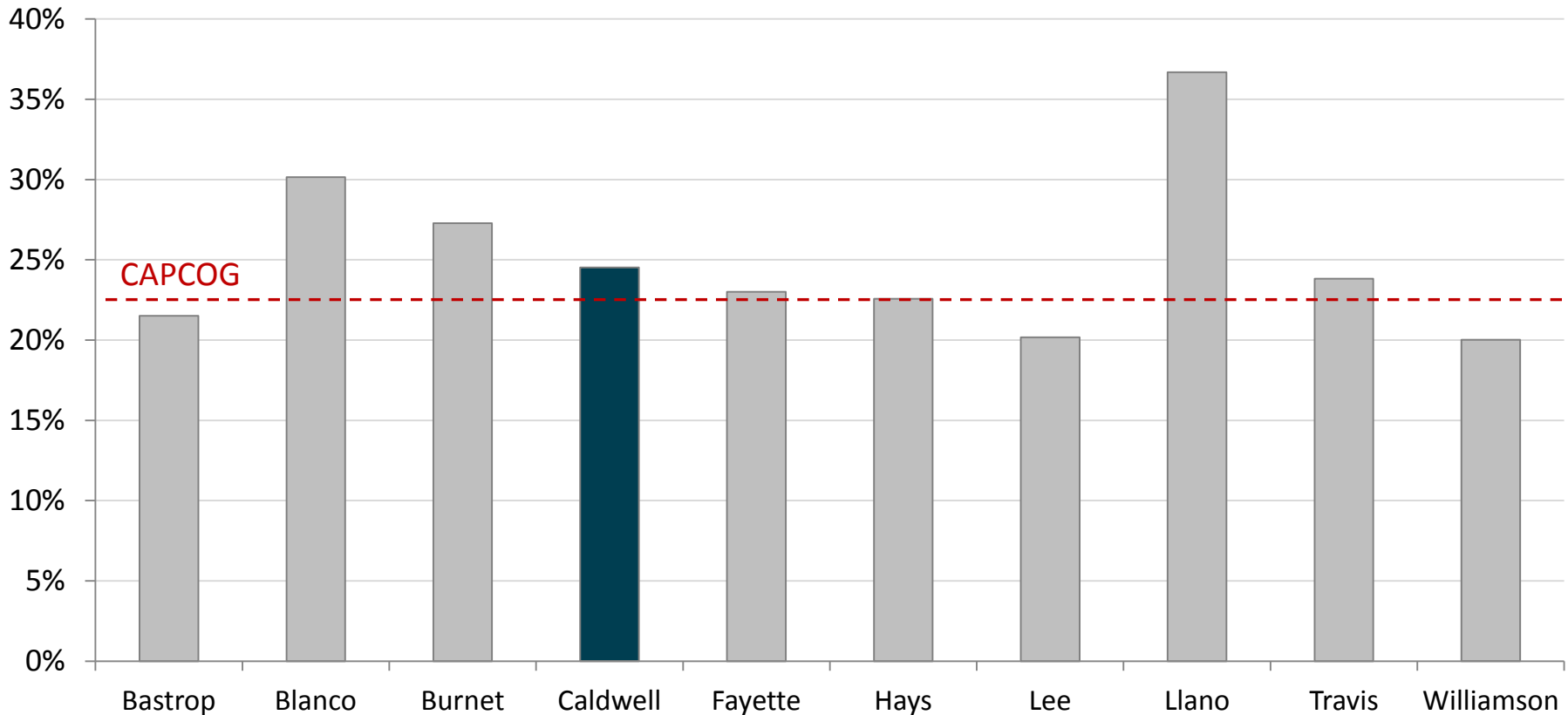


# HOUSING AFFORDABILITY (2000)

The generally accepted definition of affordability is for a household to pay no more than 30 percent of its annual income on housing. Families who pay more than 30 percent of their income for housing are considered cost burdened and may have difficulty affording necessities such as food, clothing, transportation and medical care. In 2000, nearly 25 percent of homeowners in Caldwell County with a mortgage spent more than 30 percent of their income on housing.

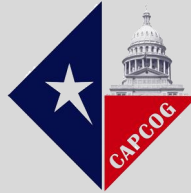


## — PERCENTAGE OF HOMEOWNERS WITH A MORTGAGE THAT SPEND MORE THAN 30% OF INCOME ON HOUSING —

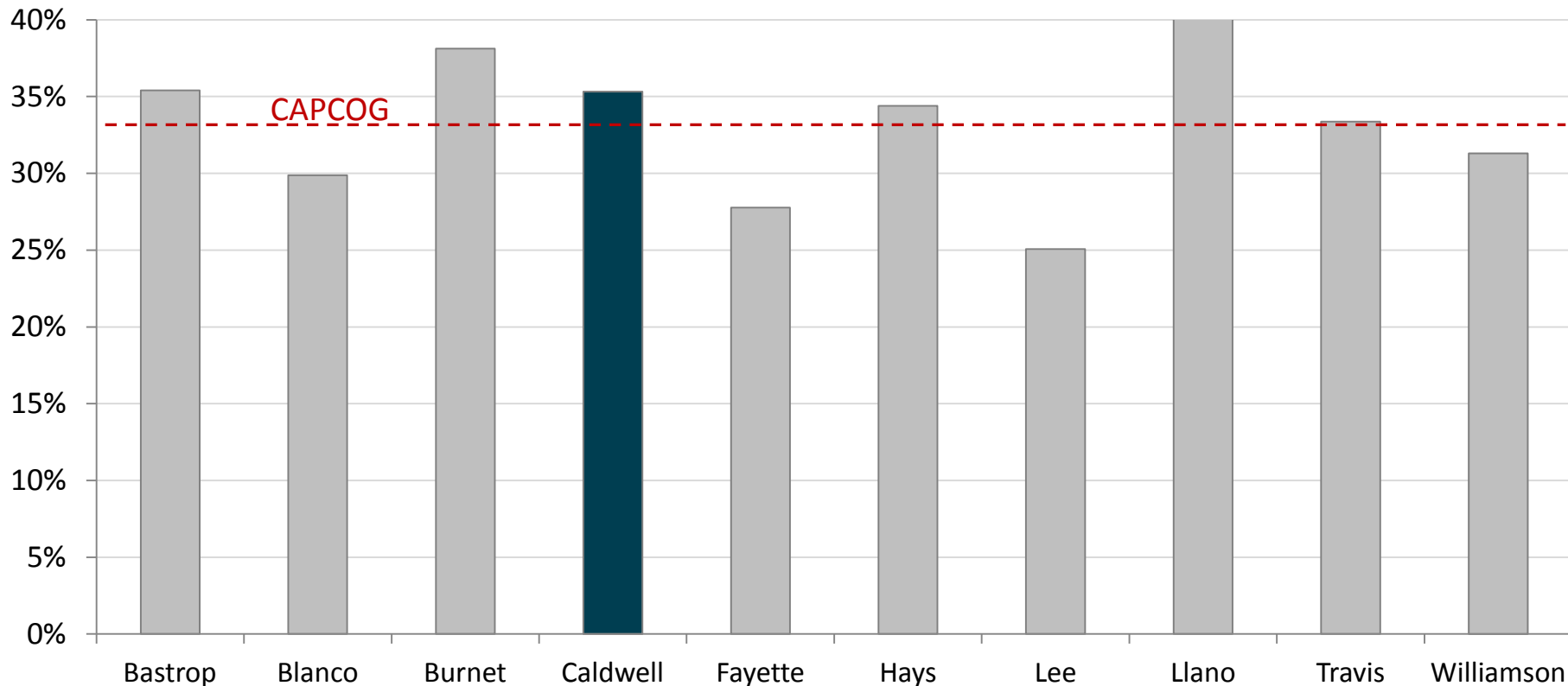


# HOUSING AFFORDABILITY (2005-2009)

According to most recent Census data, approximately 35 percent of homeowners in Caldwell County with a mortgage spend more than 30 percent of their income on housing. During the past decade, housing has become less affordable in every county within the CAPCOG region. While home prices have slightly increased during this period, stagnant (and declining) levels of income are primarily responsible for the decline of housing affordability within the CAPCOG region.



## — PERCENTAGE OF HOMEOWNERS WITH A MORTGAGE THAT SPEND MORE THAN 30% OF INCOME ON HOUSING —



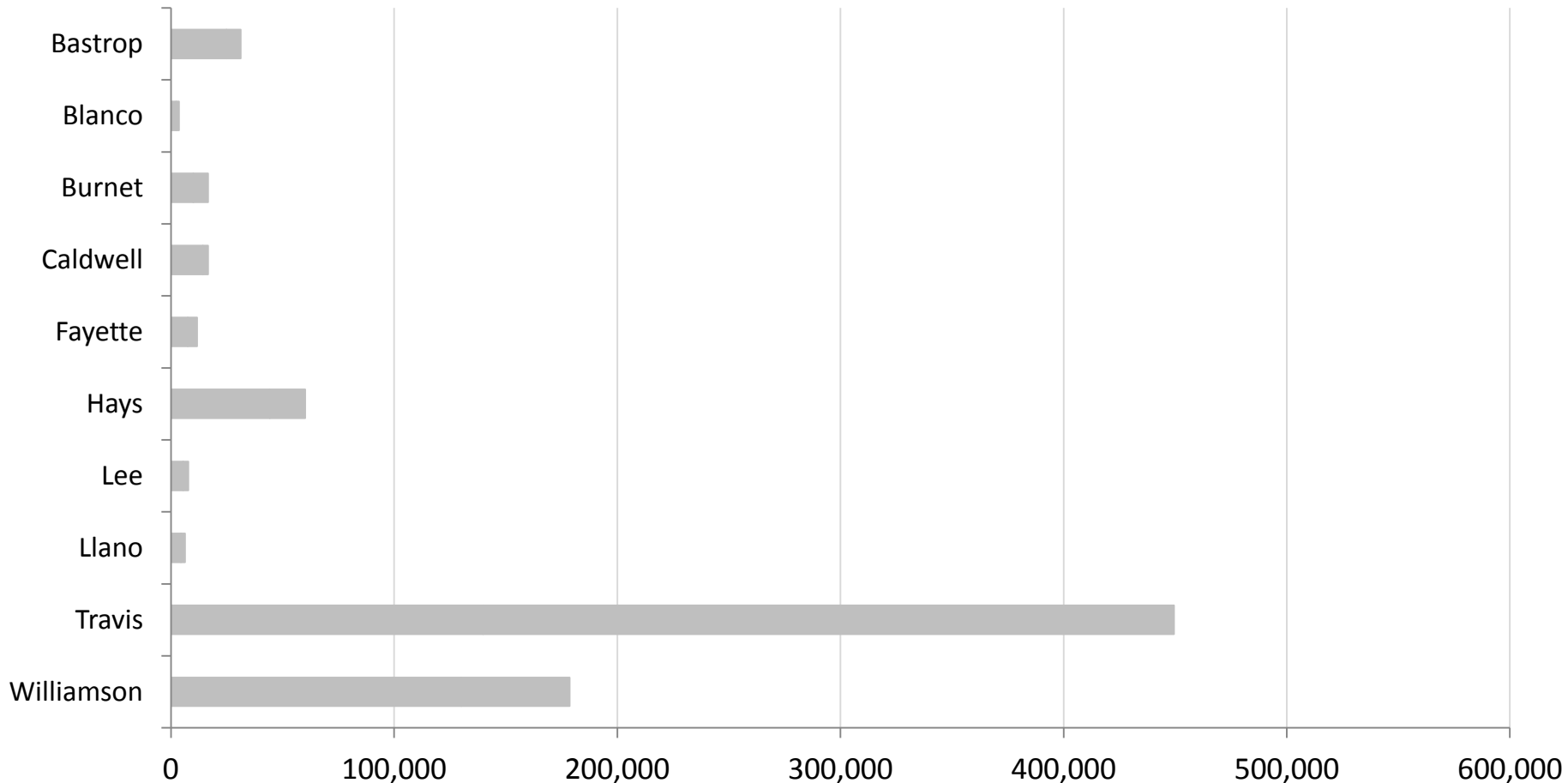
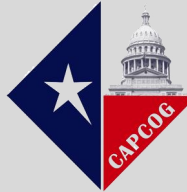
# COMMUTING PATTERNS



**Capital Area  
Council of  
Governments**

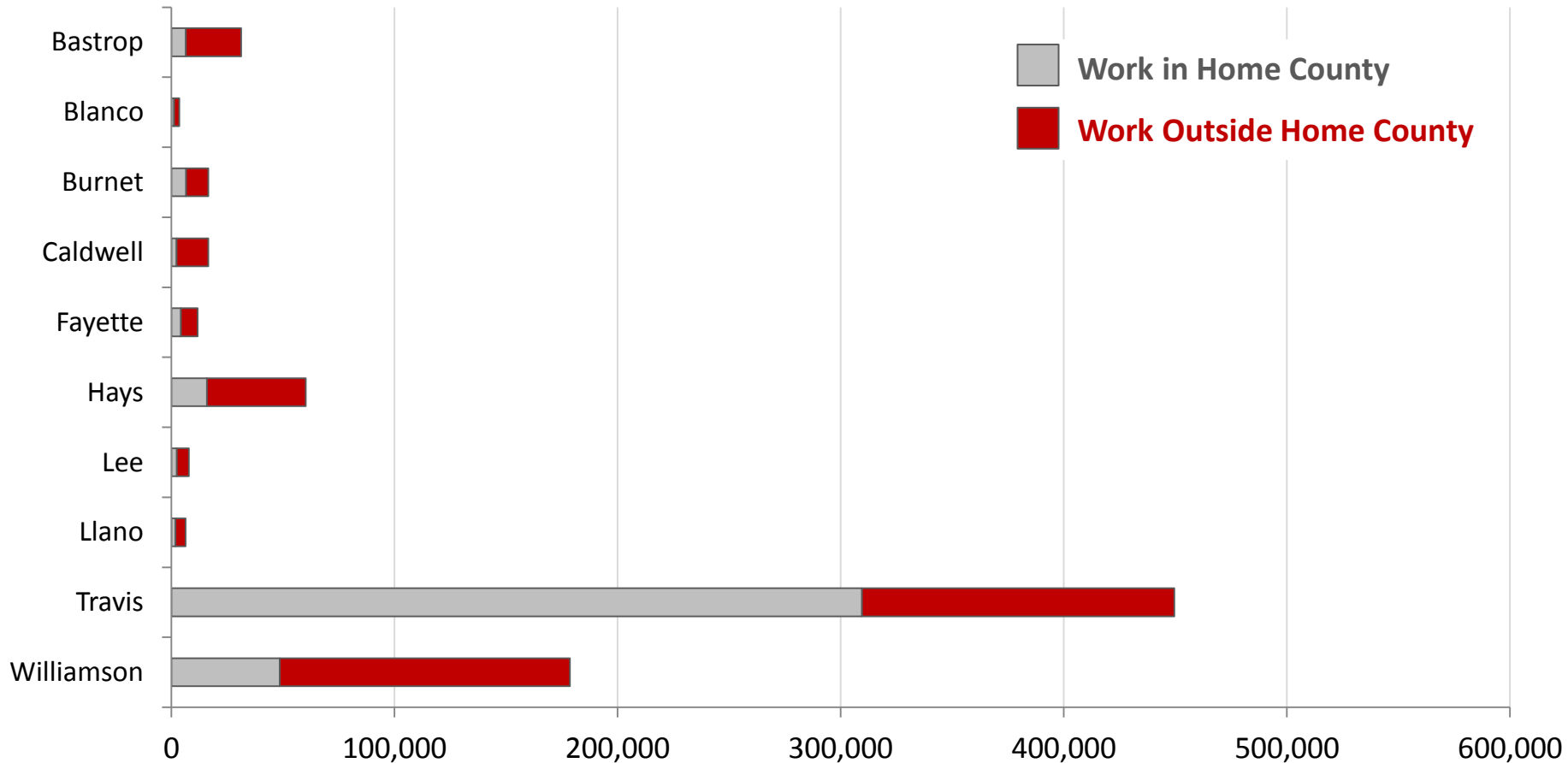
# REGIONAL WORKFORCE – RESIDENT WORKERS BY COUNTY

*With the exception of Travis County, every county within the CAPCOG region features more workers than jobs. The chart below shows the numbers of workers living in each county. In Caldwell County, for example, there are more than 16,500 employed residents.*



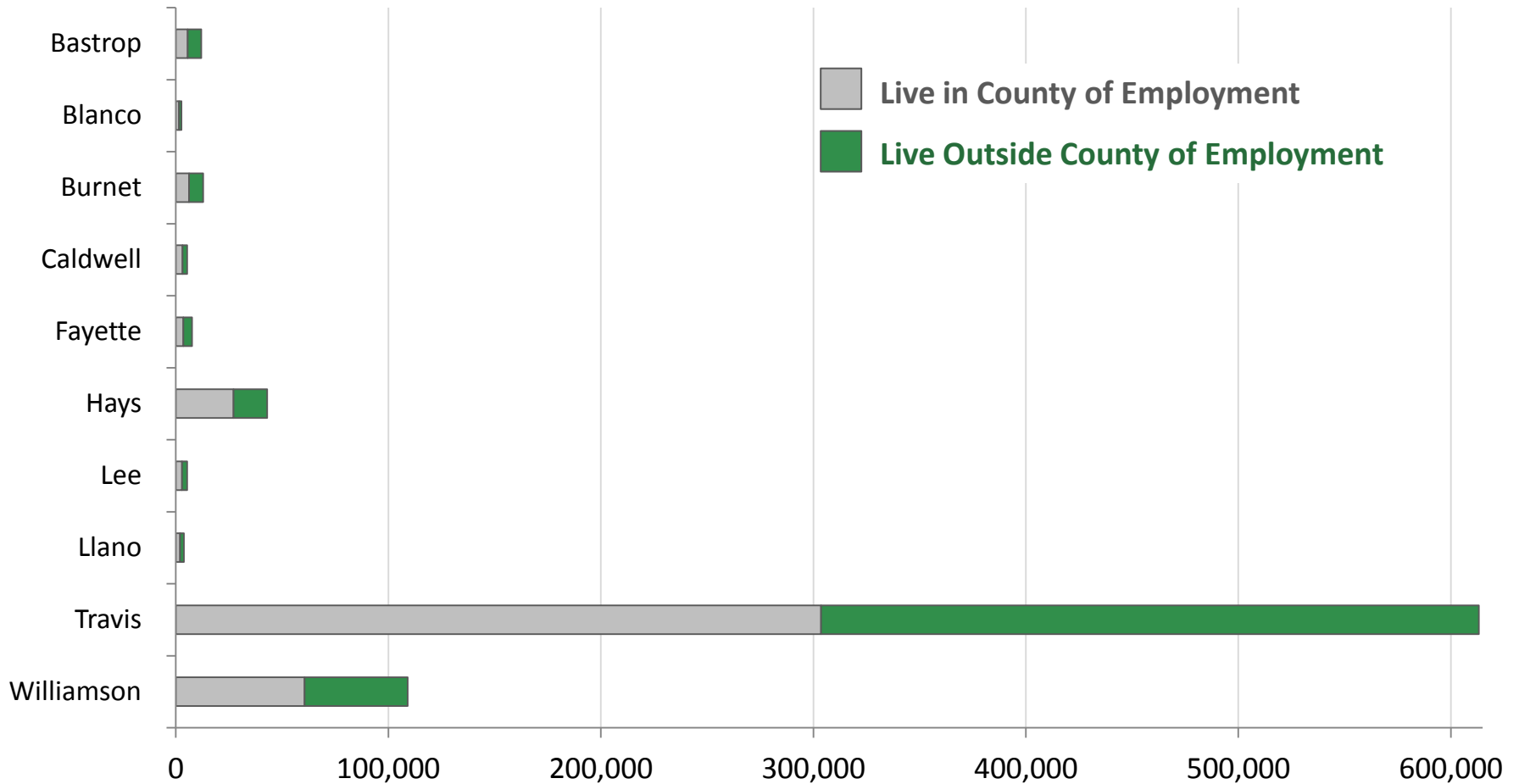
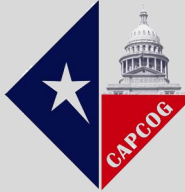
# REGIONAL WORKFORCE – RESIDENTS BY PLACE OF WORK

The majority of workers living in Caldwell County work in another county. For example, of the more than 16,500 workers living in Caldwell County, more than 14,000 are employed elsewhere. The red portion of the bars below illustrates the proportion of the county's workers that commute to another county each day.



# REGIONAL WORKFORCE – WORKERS BY PLACE OF RESIDENCE

*Caldwell County is also the place of employment for many workers who live elsewhere. More than 2,000 people commute to Caldwell County but live elsewhere.*

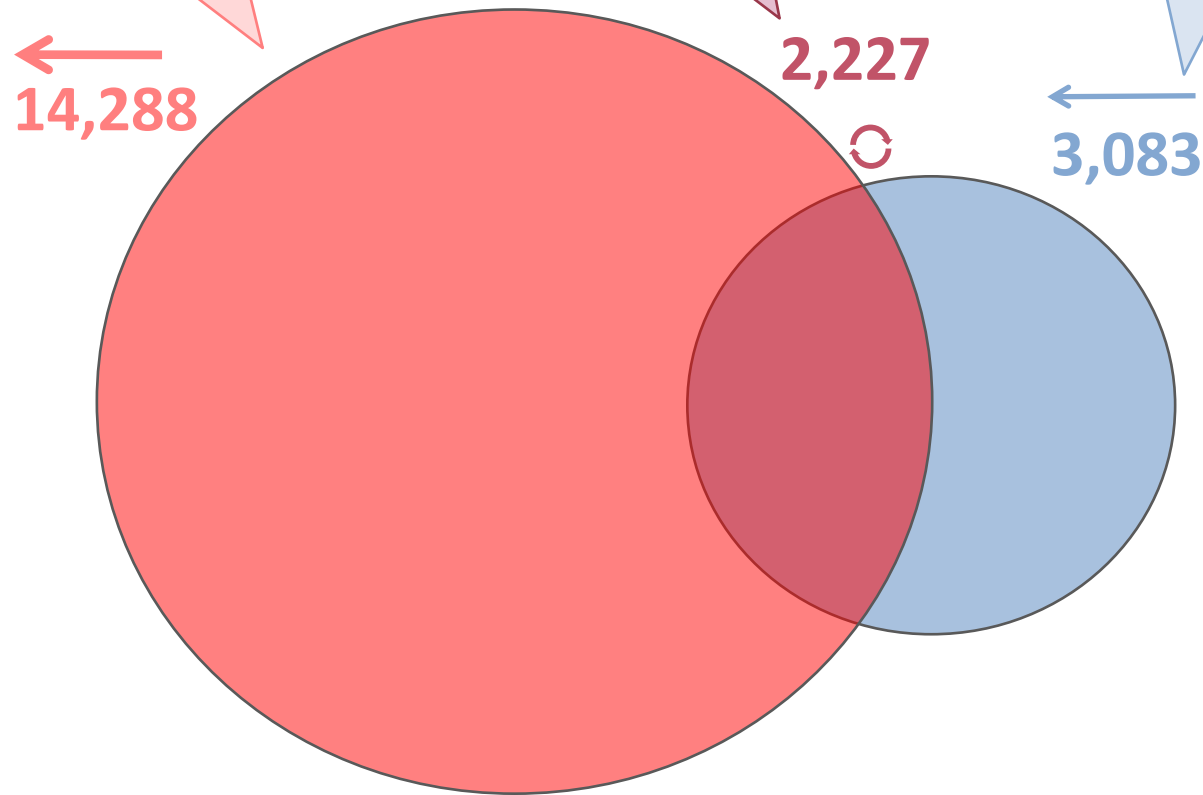
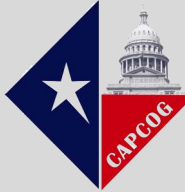


# DAILY COMMUTING PATTERN BALANCE - CALDWELL COUNTY

**A** The light red circle depicts workers living in Caldwell County who commute to another county for employment.

**B** Workers living and working in the designated county are represented by the overlapping circles.

**C** The blue circle depicts outside workers who commute into Caldwell County for work.

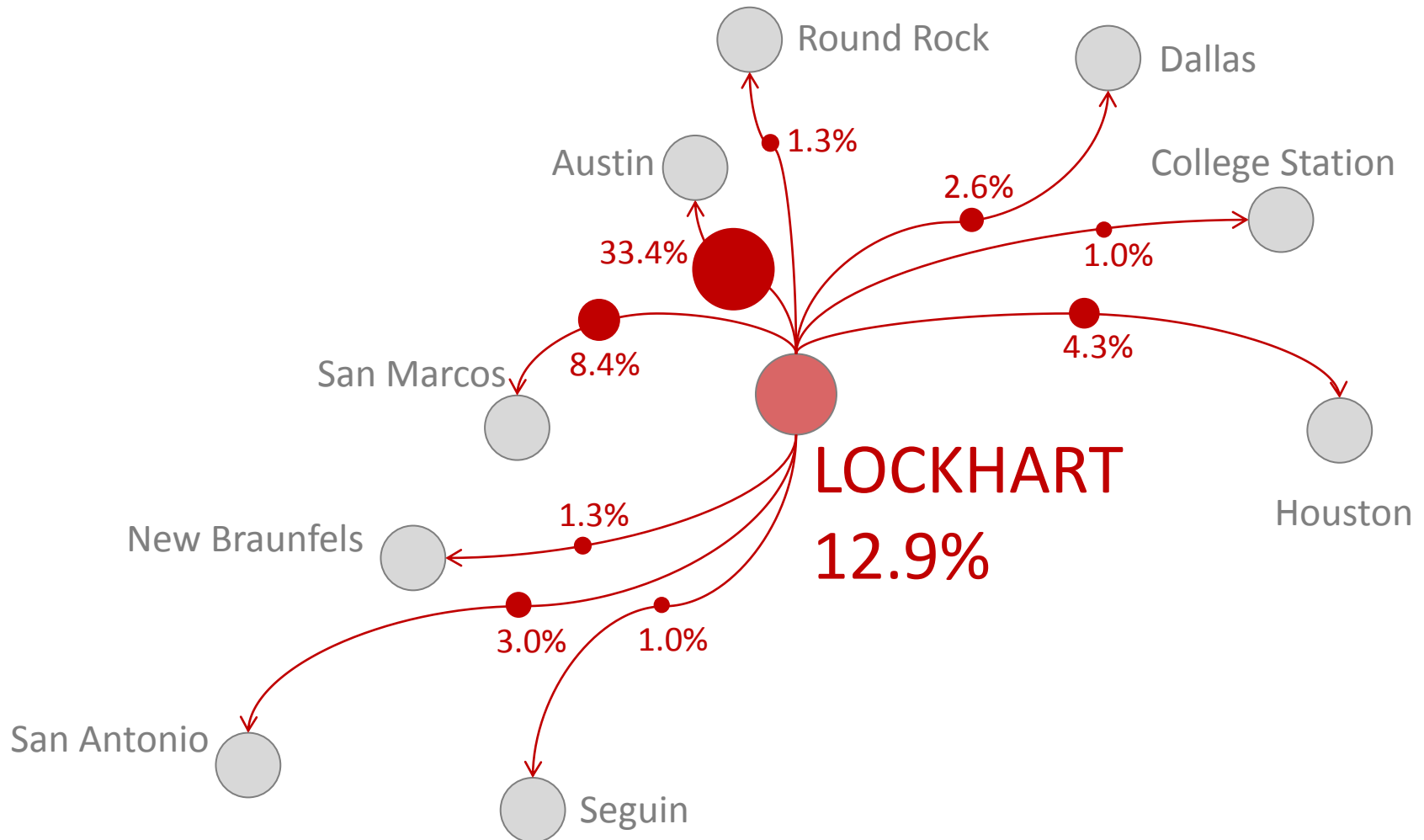
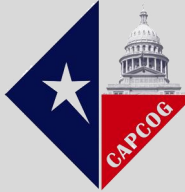


$A + B =$  WORKERS LIVING IN COUNTY

$B + C =$  INDIVIDUALS WORKING IN COUNTY

# LOCKHART— WHERE DO RESIDENTS WORK?

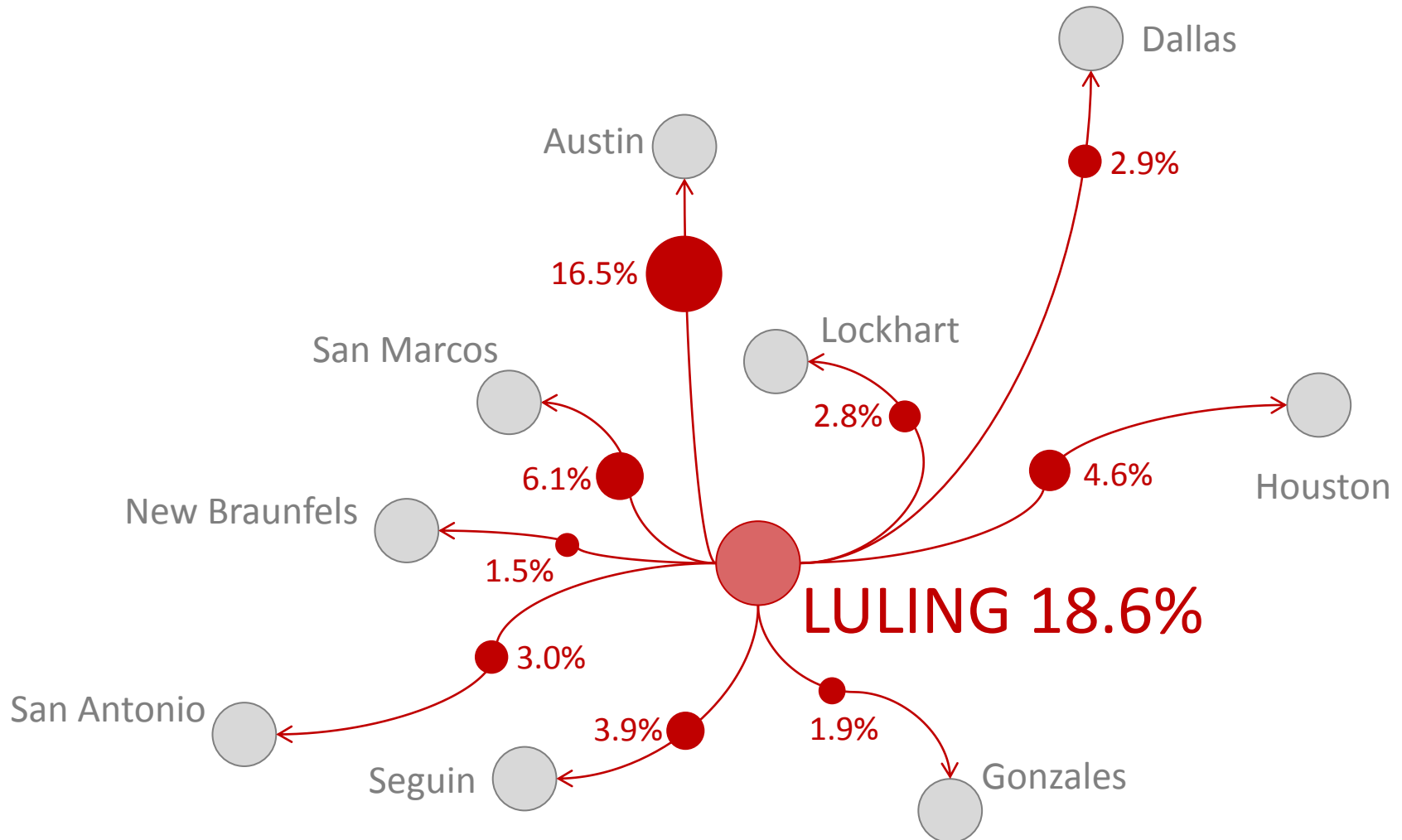
*Just as many residents of Caldwell County work in other jurisdictions, many outside residents are employed within Caldwell County. Every day, the majority of all employed residents commute to another county for employment. The top ten destination for employed residents of the City of Lockhart are listed below. The City of Austin is the largest destination of Lockhart workers; more than 33 percent of workers in Lockhart work in Austin.*





# LULING— WHERE DO RESIDENTS WORK?

*Just as many residents of Caldwell County work in other jurisdictions, many outside residents are employed within Caldwell County. Every day, the majority of all employed residents commute to another county for employment. The top ten destination for employed residents of the City of Luling are listed below. The City of Austin is the second-largest destination of Lockhart workers; more than 16 percent of workers in Lockhart work in Austin.*



# QUESTIONS

